



Software for Realizing Care's Potential

RHODE ISLAND EXECUTIVE OFFICE OF HEALTH & HUMAN SERVICES (EOHHS): PERSON CENTERED OPTIONS COUNSELING (PCOC)

WELLSKY TRAINING GUIDE

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1-855-WELLSKY

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Icons Used in this Manual

Icon	Description
	Tip Tips provide general recommendations on how to make it easier or more productive to use the Harmony solution.
	Caution The Caution icon highlights areas of note or concern, where failure to use the system properly may cause or exacerbate problems.
	Note Notes provide additional information of general interest about a specific function or process of the Harmony solution.
	Example Examples are provided to help you develop a better understanding of the subject area and how the Harmony solution may be used in a specific scenario of relevance.

WELLSKY Basics

WELLSKY is a web-based system that is accessed from a Web browser, specifically Internet Explorer® (IE). Your workstation will be configured before you “go live” to allow the system and all its functionality to operate properly. If you experience any problems during training or after “go live”, please coordinate with your System Administrator to evaluate the issue.

Screen Stacking

In WELLSKY, you will do a lot of opening and closing of screens (windows). As you are working, you can have many screens open and not know because they’re stacked on top of each other. There is no harm in this, but it can make working in WELLSKY more cumbersome. Open screens can prevent you from getting to another area of the program. On the other hand, closed screens can also prevent you from moving around.

If a screen has been closed, but should have remained open, you will see an error message similar as this:



Participant record cannot be saved because the main Call window is closed.



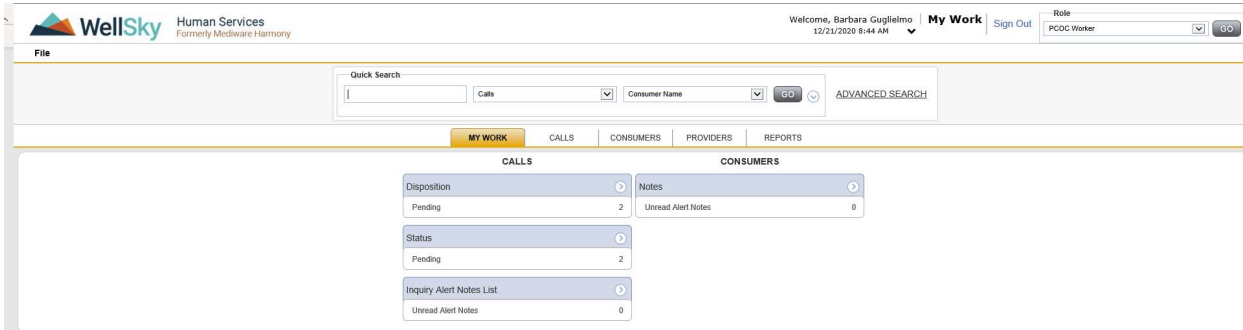
Best Practices recommend that you click **File > Save and Close** when you are saving records. This prevents unnecessary screens from staying open.

Logging into WELLSKY



Your WELLSKY Application Administrator will provide you with the URL (Internet Address) and your login credentials for both the Sandbox Environment and Live system when appropriate.

1. Open Internet Explorer and then enter the URL for WELLSKY.
2. At the login, type your **User ID** and **Password**.
3. Click **Login**.
 - a. The **My Work Dashboard** is displayed.

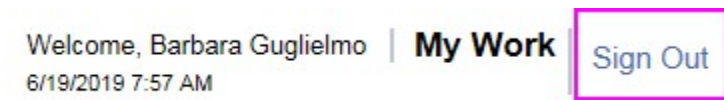


My Work Dashboard

Exit WELLSKY

To exit WELLSKY:

1. In the upper right portion of the screen, click **Sign Out**.



Sign Out

WELLSKY Password Guidelines

When changing your password, keep the following guidelines in mind.

Typical Password Guidelines:

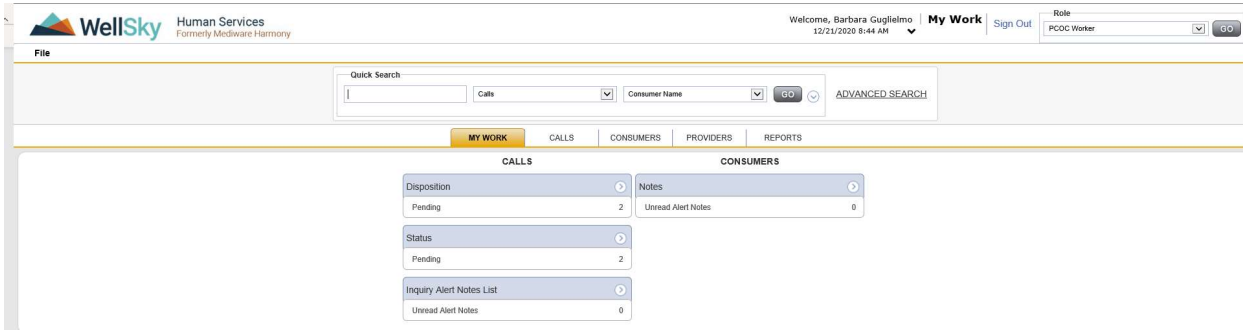
- Must be at least 8 characters
- Include at least 1 lower case letter (a-z)
- Include at least 1 special character (!, #, \$, %, etc.)
- Cannot be reused
- Expires after 60 days
- You are allowed 3 unsuccessful login attempts, and then you will be locked out of your account.

My Work

The My Work chapter displays an overall view of information specific to your work and tasks. Your username and role (as configured by the system administrator) appear on top of the page in the header bar.

The My Work chapter groups data in the following sections:

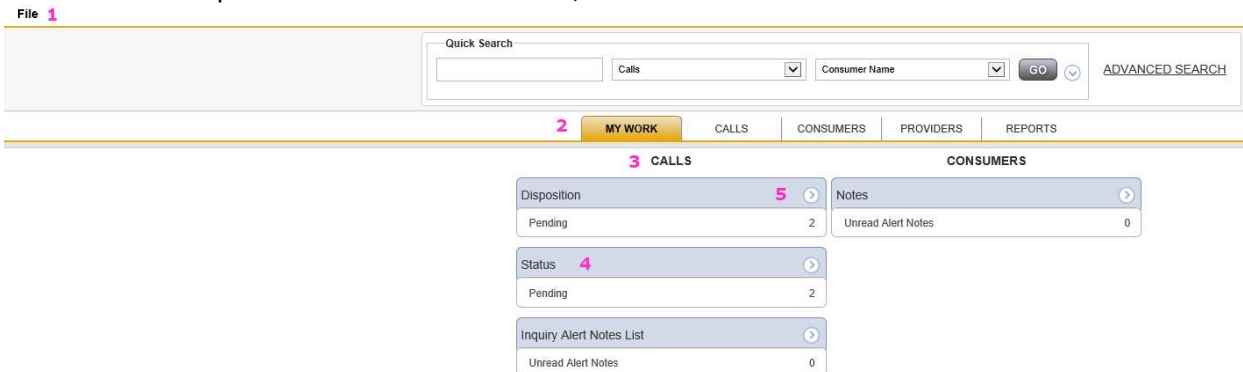
- Calls
- Consumers



My Work Dashboard

My Work Screen Elements



There are several parts of the **MY WORK** screen, as shown in the screenshot below:



My Work Dashboard

- 1 The File menu is located throughout the program. Items on the File menu vary, depending on what you are doing. One of the more common functions you'll use is the **File > Add Notes** and **File > Save and Close Notes**.
- 2 The tabs along the top of the screen are called **Chapters**. A chapter is like a section of the program. To move to another chapter, just click it. If you have the "UTILITIES" Chapter, let your supervisor know immediately. This chapter is reserved for IT.
- 3 **MY WORK** is divided into areas for calls and consumers. You may see all or just some of these areas.
- 4 Within each area are boxes that contain information. These are referred to as **Panes**. Each pane includes a right facing arrow. When you click the arrow, items in the pane are collapsed. This is helpful if you need more space on your screen. To expand the items in the pane, click the now right-facing arrow.
- 5



Many areas of the program allow you to collapse sections (panels). Click the down arrow in the circle . When you click it, it becomes a right-facing arrow .

My Work Panes

Within each Pane on the My Work homepage, numbers will be visible next to different items. These numbers represent the number of activities that exist for that topic. For example, in the screenshot below, one can see that there are three calls with Task Status equal to Pending PCOC Follow-Up/Close-Out.

MY WORK

CALLS

CONSUMERS

PROVIDERS

REPORTS

CALLS

Task Status

Pending	1
Pending Initial Call with the Consumer	1
Pending Initial PCOC Session	1
Pending Intake and Screening	1
Pending PCOC Follow-Up/Close-Out	3

Overall Status

Open	4
Pending	3

Inquiry Alert Notes List

Unread Alert Notes	0
--------------------	---

CONSUMERS

Notes

Unread Alert Notes	0
--------------------	---

OpenClose

Pending	1
---------	---

TASKS

Links


EOHHS

My Dashboards

Worker

My Work>Calls Pane

- To display the pending call records, click anywhere in the row, as highlighted in the screenshot above.



Human Services

Welcome, Barbara Guglielmo
3/15/2021 9:17 AM

Task Status

File

Filters

Task Status

Equal To

Pending PCOC Follow-Up/Close-Out

AND

×

Call ID

+

Search

Reset

3 Task Status record(s) returned - now viewing 1 through 3

Call ID	Call Date	Call Time	Call Method	Overall Status	Call Priority	Reporter Name	Prospective Consumer First Name	Prospective Consumer Last Name	Task Status	Checked Out To
10198	01/08/2021	2:08 PM	Telephone	Open		Harrison, David	David	Harrison	Pending PCOC Follow-Up/Close-Out	Guglielmo, Barbara
10193	12/21/2020	8:02 AM	Telephone	Open	Routine	Rodgers, Cecilia L	Laura	Lawson	Pending PCOC Follow-Up/Close-Out	Schmidt, Dustin
10192	12/14/2020	8:20 AM	Telephone	Open			Jason	Vanderbilt	Pending PCOC Follow-Up/Close-Out	

First

Previous

Records per page 15

Next

Last

Call Task Status List Grid

- A list view page opens to show the records. You can filter the results in a list view page to help find the records you need to work with.

File

Filters

Disposition: [v] Equal To: [v] Pending [v] AND [v] X

Call ID: [v] +

Search Reset

2 Disposition record(s) returned - now viewing 1 through 2

Call ID	Call Date	Call Time	Call Method	Call Status	Call Priority	Reporter Name	Prospective Consumer First Name	Prospective Consumer Last Name	Disposition	Received By
10193	12/21/2020	8:02 AM	Telephone	Pending	Routine	Rodgers, Cecilia L.	Laura	Lawson	Pending	Guglielmo, Barbara
10192	12/14/2020	8:29 AM	Telephone	Pending		Jason	Jason	Vanderbilt	Pending	Guglielmo, Barbara

<< First Previous Retrive 15 Records at a time Next > Last >>

Use filter to find more specific results

Use the fly-out menus to see more options

Call Task Status List Grid

3. Hover over the fly-out menu at the end of a row to see more options.

Pending Ticklers

The Ticklers pane shows pending ticklers, which represent tasks that must be completed. Workers can select any task and complete it. Once completed, the tickler is removed from the Pending Ticklers list.

Unread Notes

The Unread Notes section of My Work shows notes created by other workers and routed to you. Select the unread note to view it. If a note is routed to a user who doesn't have the My Work Calls sections they will not receive the note, but the note is still visible in the call or consumer record.

Alert Notes

The Alert Notes section of the My Work Calls section shows alert notes routed by other workers. Click on the alert note to view it. If a note is routed to a user who doesn't have the My Work Calls section, they will not receive the note, but the note is still visible in the consumer or provider record.

Opening a note from My Work

When a note is routed to a note recipient, the note will appear in that worker's My Work desktop. Routing a note to another worker is a valuable way to securely share notes relevant to consumers in WellSky Human Services. Notes will be listed in a Notes node on the My Work desktop. A Notes pane may appear in either the Calls or Consumers sections of your My Work desktop.

1. To open a note from My Work
2. From the **My Work** dashboard, navigate to the **Notes** node.

Notes >

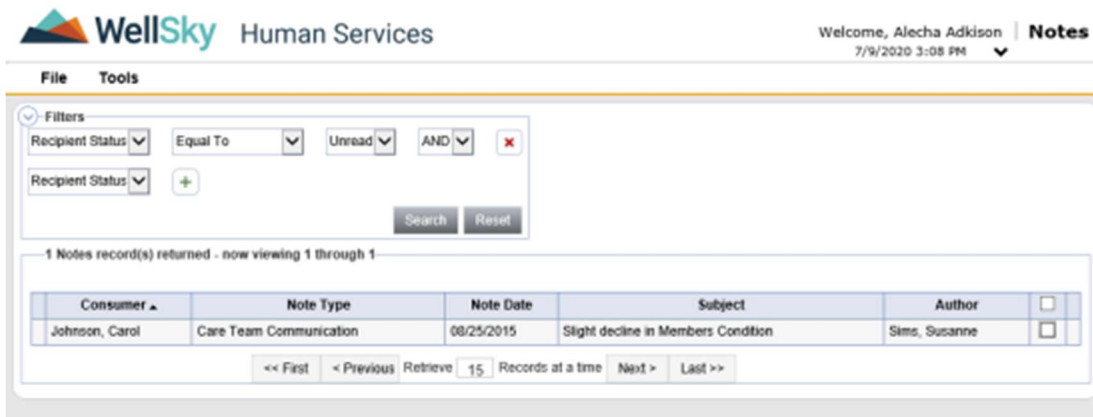
Draft	1
Pending	1

Notes >

Unread Alert Notes	1
--------------------	---

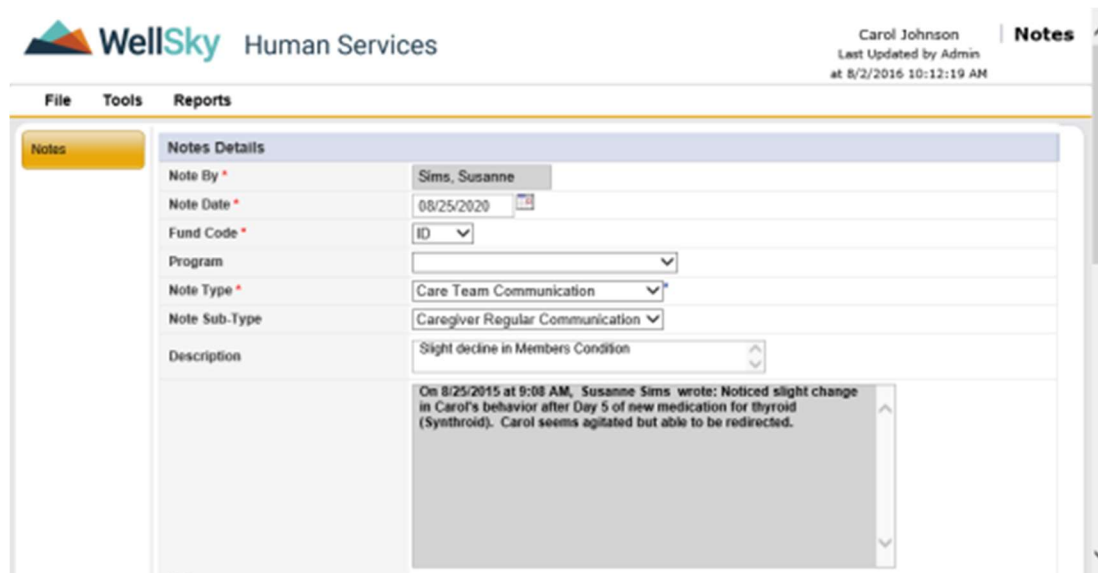
My Work>Notes Pane

3. Select a Notes queue. For example, select the **Unread Alert Notes** queue. The Notes list view page opens.



[My Work>Note List Grid](#)

4. Select the note from the list view grid. The Note detail page opens.



[Note Details Page](#)

1. From the Notes detail page, you can read and edit the note, add an attachment, and forward it to another worker as a note recipient.
2. WellSky Human Services includes an option in the System Setup utility that allows workers to manually mark a note as read. When this option is active, the note will remain listed in the My Work Notes queue until you mark it as read. To mark a note as read, select **Mark as Read** from the **Tools** menu.
3. To export the note in report format, select **Note Detail** from the **Reports** menu.
4. To close the note, select **Save and Close Notes** from the **File** menu.

Opening a tickler from My Work

Ticklers are the individual tasks that workers are prompted to complete when an event occurs. Ticklers remind users to complete a screen, fill out a form, or perform some other action. A Ticklers pane may be found in more than one section of My Work. You may see a Ticklers section in the Calls or Consumers sections.

Ticklers are associated with Workflow Wizards (WFWs).

You can also open ticklers from the specific chapter. For example, you can open ticklers from the Consumers chapter.

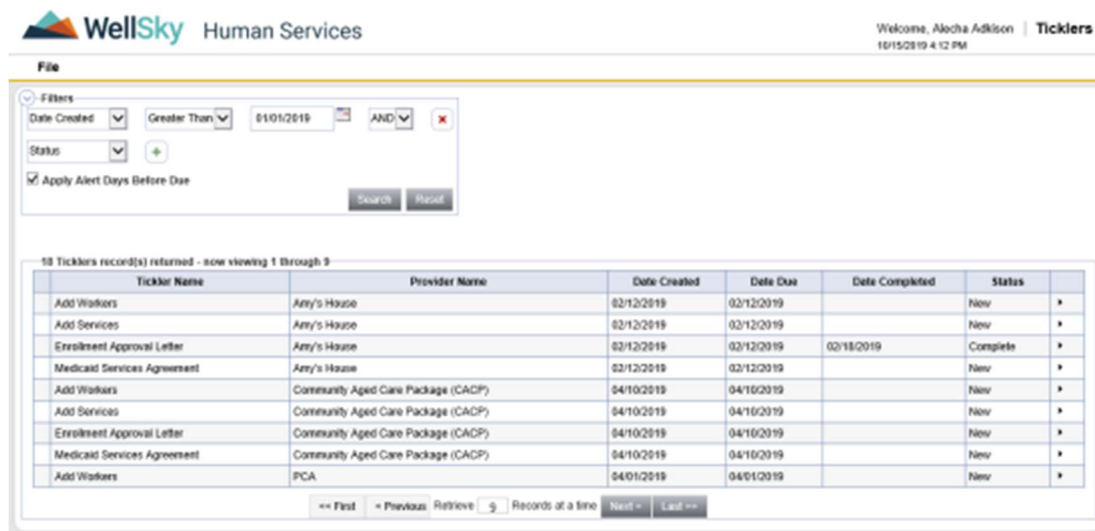
To open a tickler from My Work

1. Click the **Ticklers** link in the section you are working with.



My Work>Ticklers Pane

2. The Ticklers list view page opens. If needed, use the filters to locate the tickler.



My Work>Ticklers List Page

To see a tickler that has a future due date, clear the **Apply Alert Days Before Due** option in the Filters section. Click **Search**.

3. Select the tickler you want to work with from the list view grid. The page that opens will be specific to the tickler. For example, if the tickler name indicates an enrollment letter, the mail merge page will open. If the tickler name indicates adding a worker, the provider's worker page might open.
4. If the tickler is part of a Workflow Wizard, the left-hand navigation area will show the Workflow Wizard step or steps.
5. Complete the task defined in the tickler. Select **Save** from the **File** menu when done.

Navigating the Application

This section provides a brief overview and some tips for working in the application.

Chapters

Chapters are links to different areas of WELLSKY. Authorized users can access chapters at any time by simply clicking the desired Chapter button (or tab) across the top of the screen. Note that not all workers can see all the listed chapters.

Your view may differ from the example below. (Remember, every Role will have different Chapters. If you have the “UTILITIES” Chapter, let your supervisor know immediately. This chapter is reserved for IT.)



Chapter	Definition
My Work	My Work displays an overall view of information specific to the logged in user. The page provides links to information assigned only to the user along with reporting and user management assignments for quick reference and easy access.
Calls	The Calls Chapter is used to record the first reported information necessary for initiating the screening process. All Call records can be accessed in this chapter.
Consumers	The Consumers Chapter contains records about Consumers who are receiving services through the Person-Centered Options Counseling Program.
Providers	The Providers Chapter contains records of Providers such as Office of Healthy Aging. Provider records may contain information such as Workers, Notes, and Enrollments.
Reports	The Reports Chapter provides standard reports on the data contained in the application.

File Menu Bar

The **File** menu is displayed throughout the application and is in the upper left corner of the screen. Depending on the screen that’s open, other menus may be displayed. This is the location where you’ll go to create or add files, close and save files and print files, among other functions.

Additional functions remain available under each option. Hovering your cursor above each **File Menu** bar category will expand additional menus. Access to these is granted based on the permissions which are driven by roles. Some examples include and are not limited to: **Save**, **Save and Close**, **Print**, and **Add Call**.



File Tools Reports Word Merge

WellSky Toolbar

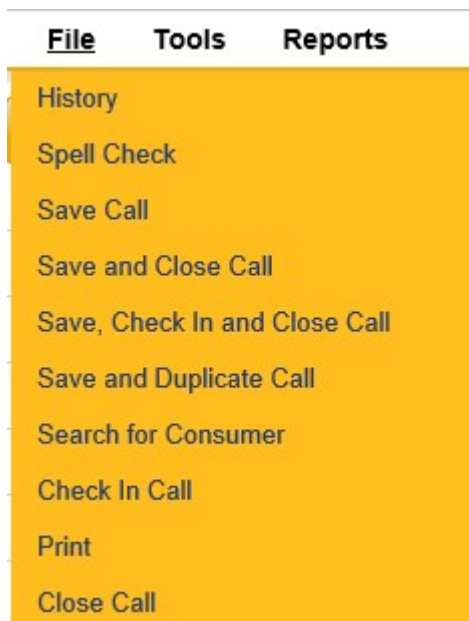
Functions within the **File** menu are consistent for most pages.

When users scroll through a page in WELLSKY, the **File Menu** header is frozen so that users will always be able to access these **File Menu** functions no matter where the cursor is located on the page.

- **File** – Contains the functions to add a new record or to view history changes to the data in view.
- **Edit** – Provides the ability to make changes to the data included in the record.
- **Tools** - Provides the user with additional functionality based on the page currently in view.
- **Reports** – Lists standard reports built into the WellSky software. Additional reports may be available to certain roles or groups. If a user has access to the Reports Menu, click the menu and select the report and it will open in a new window.
- **Ticklers** – Provides the user with a list of “ticklers” or reminders generated for a specific Call record. This menu is only displayed at a chapter level.
- **Word Merge** - Lists documents that have been uploaded to the application using the **Word Merge** Utility and are available to certain roles and groups. If a user has access to the **Word Merge** File menu, to access the document, click the file menu and select the document and it will open a new window.

Call Records: File Menu

As you are working within a record, you will save and close records. This is done on the **File** menu, located near the top of your screen. The **File** menu options change, depending on what you’re doing; the screenshot below displays what the **File** menu might look like.



Example of File menu

The table below describes some of the **File** actions you'll work with as you are creating a call record.

File Menu	Description
History	Allows user view history changes to the data in view.
Save	Saves changes since the last save and keeps the record open. Saving a record can be done at any time.
Save and Close	Saves changes since the last save and closes the record.
Print	Allows user to print the information on the current screen.
Delete	Allows user to delete the record permanently.
Close	Closes the record without saving any recent changes.



When you need to add, remove, or save files, the **File** menu is the place to go. An example in the directions could appear as: go to **File > Save and Close Notes**. Closing a window by clicking on the "X" in the top right-hand corner of the window is not recommended. Information may be lost.

Field Formats

There are a few different types of data fields within WellSky, such as text boxes, checkboxes, date fields, dropdowns (sometimes called lookups) and search fields.

Required Fields

Required fields are always indicated by a red asterisk (*)

Fields that affect other fields

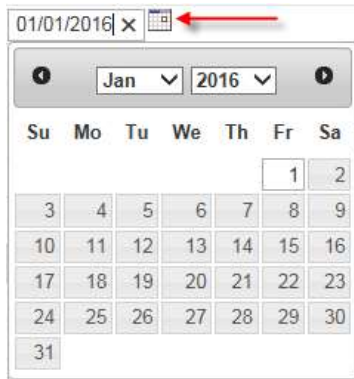
Sometimes choosing a value in one dropdown field will filter or change the values shown in another dropdown field on the same page. This is indicated with a black asterisk (*) to the right of the field.

Date Fields

Date fields can be populated in either of two ways. First, the user can simply type the numbers and WellSky will automatically format the field.

E.g. for this date field, the user typed: 01012016

The other option is to click on the calendar icon and use the calendar display. To select a specific date, simply click on the number after the correct month and year are chosen.



Pre-formatted Fields

Some fields are pre-formatted for certain types of data, most commonly this includes SSN and Phone fields. The user may simply type the numbers and WellSky will automatically add the appropriate formatting such as dashes or brackets.

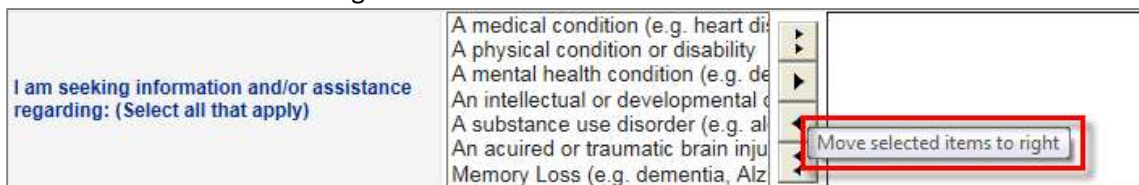
E.g. for this phone field, the user typed: 5555555555



Multi Select Boxes

Using the Arrow Buttons

Some areas of the application require you to select items from a list, and move them from one field to another, using arrow buttons. If you hover over one of the arrow buttons, a tooltip is displayed that describes what the button does. In the screenshot below, the mouse was hovering over the button to move selected items to the right.



Example of a Multi-Select Question

Button Definitions

- ▶ Move all items from the left to the right
- ▶ Move selected items from the left to the right
- ◀ Move selected items from the right to the left
- ◀ Move all items from the right to the left

Using the Shift and Ctrl keys

If you want to select more than one item, and the items are *all together*, press and hold the **Shift** key on your keyboard and select the first and last records in the group. Then, click the right-facing button to move all items to either the right or left field.

If you want to select more than one item, and the items are *not together*, press and hold the **Ctrl** key on your keyboard and click the records you want. Click the right-facing button to move the items to either the right or left field.

Example

In the screenshot below, the applicant is requesting information on a mental health condition and a substance use disorder. You could either select each item from the left side and click the right-facing arrow to move them to the right or use your **Ctrl** key to select both items at the same time and then click the right-facing arrow.

I am seeking information and/or assistance regarding: (Select all that apply)	A medical condition (e.g. heart di	<div>▶</div> <div>▶</div> <div>◀</div> <div>◀</div>	A mental health condition (e.g. d
	A physical condition or disability		A substance use disorder (e.g. a
	An intellectual or developmental c		
	An acquired or traumatic brain inju		
	Memory Loss (e.g. dementia, Alz		

Example of a Multi-Select Question

Places

The Places feature within WellSky allows address fields to be linked together and prefill or filter the options for the linked fields. This also prevents users from selecting incorrect combinations.

City	<input type="text"/>	<input type="button" value="Clear"/>
State	<input type="text"/>	<input type="button" value="Clear"/>
Zip Code	<input type="text"/>	<input type="button" value="Clear"/>

Example of Address fields

Entering a zip code first, for example, will filter the other fields automatically, and if there is only one option, the other fields will pre-fill. The fields below were all populated simply by entering a zip code of 20190.

City	Reston	<input type="button" value="Clear"/>
State	Virginia	<input type="button" value="Clear"/>
Zip Code	20190	<input type="button" value="Clear"/>

Example of Address fields

List Views and Search Filters

In various areas of WellSky, records may appear in a **List View** screen. These screens limit the number of records returned at one time.

Walsh, Poppy (10002)

Demographics
Guardianship Status
Program Enrollments
Notes
Documentation
Diagnosis
Medications
Family Relations
Service Providers

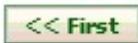


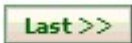
Filters
Active Equal To Yes AND X
Relation ID +
Search Reset

7 Service Providers record(s) returned - now viewing 1 through 7

Relation ID	Primary Relationship	Last Name ▲	First Name	Phone	Fax Number	Work Phone	
10005	Attorney	Benson	George		(850)333-2220	(850)333-2222	gben
10006	Dentist	Brandy	Stella		(850)456-4440	(850)456-4444	sbrar
10007	Doctor	Denny	Althea		(850)787-1100	(850)787-1000	aden
10016	Pharmacy	Lopez	Charles		(850)877-1000	(850)877-7108	
10011	Cemetery	Reynolds	Jane				
10010	Insurance Company	Smith	Frank			(850)554-4444	
10009	Funeral Home	Strong	James			(850)555-5555	

Example of a list page

List View screens allow you to quickly retrieve a desired record. If the desired record is not displayed on the initial list view, you can click on one of the following buttons to scroll through the returned records:

Button	Description
	Jumps to the first record in the list
	Jumps button jumps to the previous record in the list
	Jumps to the next record in the list
	Jumps to the last record in the list



Tip

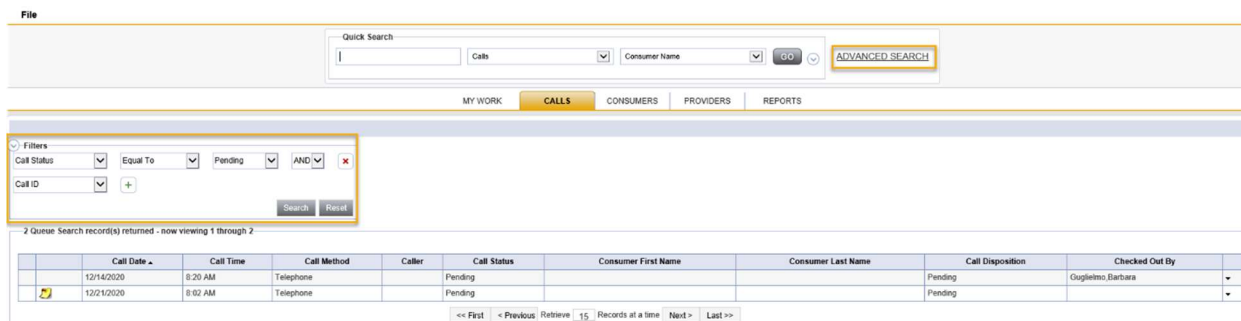
You can also modify the number of records returned in the list view by entering the desired number in the “Retrieve [15] records at a time” field and then hitting the Enter key or clicking on one of the record search buttons (i.e., First, Previous, Next, Last).

You may sort the records by ascending or descending order by clicking on the column headers in the list view.

Advanced Search

The Advanced Search function allows you to look for existing data. There are multiple options and an expanded range of input variables for detailing your criteria to find the records you need.

To search for a Call record using the **Advanced Search** function, take the following steps:



Example of Advanced Search

1. Click the **Advanced Search** link.
 - a. The Advanced Search window is displayed.
2. Once you have entered your search criteria in the Filters section, click **Search**.
3. The system displays all items matching the search criteria you defined.



Note

You will only be able to see items that are permitted by security settings for your User ID

Advanced Search Window

Each filter allows you to select from the following comparison search criteria:

Term	Definition
Equal To	Returns records that match the entered criteria. For example, if <Last Name> is entered as "equal to" a specific person's name, the Consumer records assigned to that Worker will be returned.
Begins With	Returns records that begin with the entered criteria. For example, if <Last Name> is entered as "begins with" 'T' the system will return records assigned to the Worker having last names that start with 'T', such as Tester and Thomas.
Ends With	Returns records that end with the entered criteria. For example, if you search on <Last Name> "ends with" 'r', you can retrieve records where a Consumer's name ends in 'r', such as Tester.
Not Equal To	Returns records that do not match the entered criteria. For example, if a particular name is entered for <Last Name> , the system will return a list of records except those records for the name provided in the search criteria.
Greater Than	Returns records that are dated later than the entered criteria. For example, if <DOB> is entered as "greater than" '03/01/2015', the system will return all records with a record whose date of births are after March 1, 2015.
Less Than	Returns records that are dated earlier than the entered criteria. For example, if <DOB> is entered as "less than" '03/31/2015', the system will return data for all records with a birth date before March 31, 2015.
Contains	Returns records that contain the entered criteria. For example, if <Last Name> is entered as "contains" specific values in the person's name, the Consumer Record(s) assigned to that worker with those values would be returned.
Blank	A record is returned where the selected field does not have a value in the field.
Non-Blank	Returns records where the selected field does have a value in the field.

Boolean Logic

In addition, you can search on these filters using Boolean (**and/or**) logic:

- **AND** - Tightens your search: Records are returned only if they meet ALL the criteria you entered.



Example

Find Consumers where **<DOB>** is greater than (>) March 1, 2000 and **<DOB>** is less than (<) June 30, 2015. This returns all reports dated between the two dates entered.

- **OR** - Broadens your search: Records are returned if they meet EITHER criteria that you entered:



Example

Find records where **<Last Name>** equals <Jones> or **<DOB>** = "June 22, 1998." The system returns records for Jones regardless of date of birth, **and** also returns any consumer records whose birth date is 06/22/2015.

Once you have entered your search criteria, click the **Search** button or you can tab to the **Search** button using your **Tab** key and press **Enter**.

The system displays all items matching the search criteria you defined.

**Note**

You will only be able to see items that are permitted by security settings for your User ID



Did your search return the expected results? If not, click the **Reset** button to clear your criteria. Reconsider your filters and try again.

Switching Roles

Throughout the application, you may use many different Roles. Roles define a set of capabilities or permissions that you have within WELLSKY, and each Role performs different functions. A Role change is indicated by the following symbol and instruction:



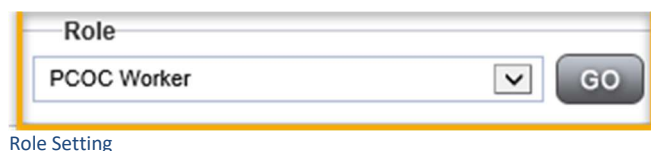
Switch Role to **PCOC Worker**

When you switch roles, the following process must be followed:

1. Go to the upper-right portion of the screen, in the **Role** field



2. Click the down arrow and then select the **Role** you want to work with.
3. Click **Go**

**Note**

You may not see all the roles as displayed in the dropdown list.

Using a People Search

Every time you add a person to the database as a participant, the application creates a record in the database people table. A running history of any changes or additions made to the person's participant record is recorded in the people table to help you search to find that person's record in the database.

For example, a participant is added to the database as Cheryl Smith, but she later changes her name to Cheryl Werks. Every time you add a person to the database as a participant, the application creates a record in the database people table. A running history of any changes or additions made to the person's participant record is recorded in the people table to help you search to find that person's record in the database.

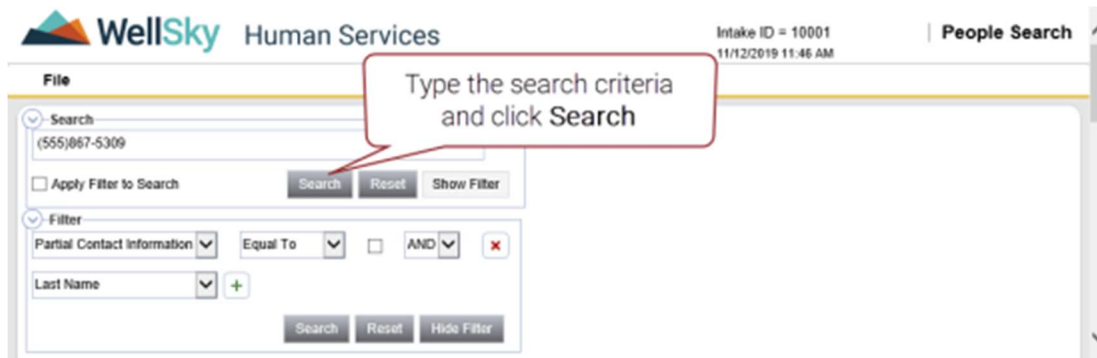
For example, a participant is added to the database as Cheryl Smith, but she later changes her name to Cheryl Werks. Both names are added to the same record in the people table. When you search for the last name "smith," the search will return information on both Cheryl Smith and Cheryl Werks because they are associated with the same person record.

You can search for each participant (for example, caller, prospective consumer, or other contact), by clicking on the search link. In the Caller and Prospective Consumer sections, the Search link is located in the section header. In the Contact section, the Search link is located in the detail page that opens when you add a new record.

Note: Any information you type in the demographic fields can be used as part of the search. For example, if you type the last name before you select the Search link, the filter will include the last name as a search criterion.

To use people search without filters

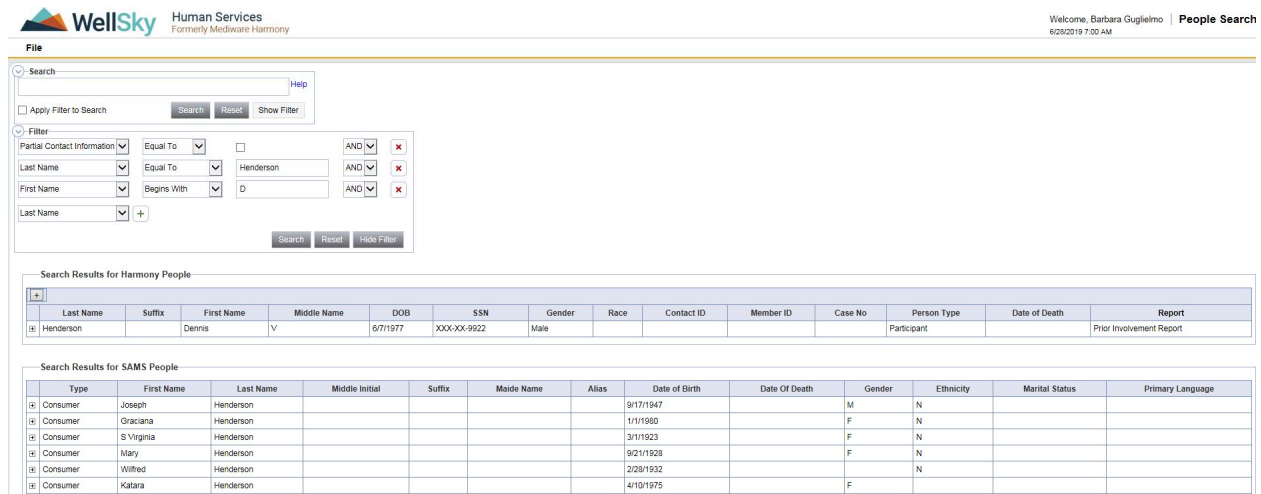
1. Click the **Search** link. The People Search page opens.



People Search window

2. Type the search value in the Search bar and click **Search**. You can search based on any of the information listed below. For example, you can search by last name or phone number to find a record.
 - First Name
 - Middle name
 - Last Name
 - Street
 - Street2
 - City
 - State
 - Zip Code

- County
 - Phone
 - Phone Extension
 - Gender
 - Race
 - Ethnicity
 - Identifier Value (SSN)
 - Email Address
3. The search results display in two list view grid. The first grid identifies people that are in the WellSky database. The second grid identifies people that are in the SAMS database.



WellSky Human Services
Formerly Mediware Harmony

Welcome, Barbara Guglielmo | People Search
6/26/2019 7:00 AM

File

Search

Apply Filter to Search

Filter

Partial Contact Information

Last Name

First Name

Last Name

Search Results for Harmony People

Last Name	Suffix	First Name	Middle Name	DOB	SSN	Gender	Race	Contact ID	Member ID	Case No	Person Type	Date of Death	Report
Henderson		Dennis	V	6/7/1977	XXX-XX-9922	Male					Participant		Prior Involvement Report

Search Results for SAMS People

Type	First Name	Last Name	Middle Initial	Suffix	Maide Name	Alias	Date of Birth	Date Of Death	Gender	Ethnicity	Marital Status	Primary Language
Consumer	Joseph	Henderson					9/17/1947		M	N		
Consumer	Graciana	Henderson					1/1/1980		F	N		
Consumer	S Virginia	Henderson					3/1/1923		F	N		
Consumer	Mary	Henderson					9/21/1928		F	N		
Consumer	Wilfred	Henderson					2/28/1932		N			
Consumer	Katara	Henderson					4/10/1975		F			

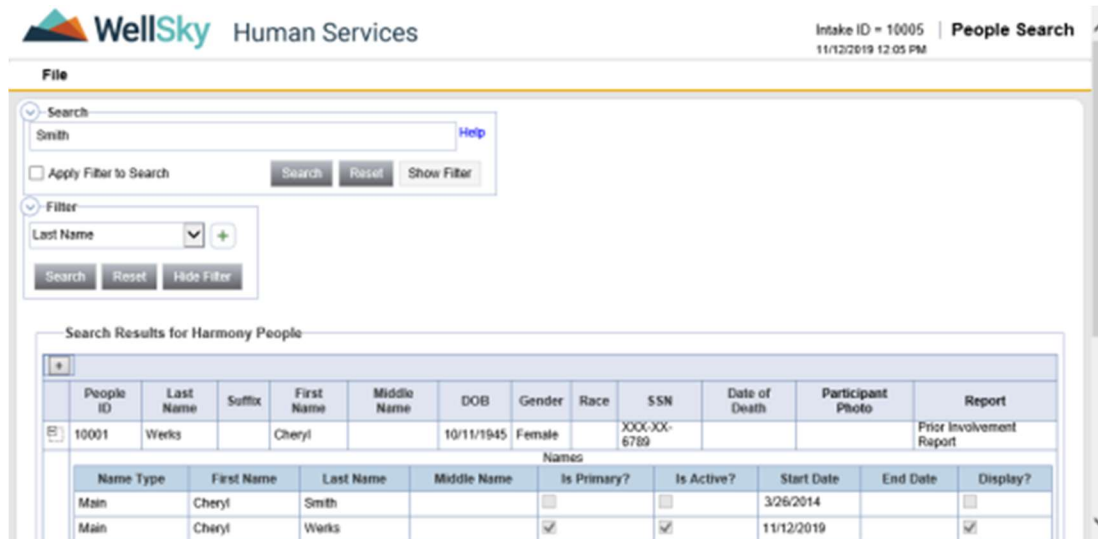
[People Search Page](#)



Note:

If a person is selected from the SAMS grid, it will create a people record in WellSky. The next time a search is conducted on that person, their people record will display in the Harmony (WellSky) grid.

4. Use the expansion icon (+) in the list view grid to view additional information.



File

Intake ID = 10005 | People Search 11/12/2019 12:05 PM

Search

Smith [Help](#)

☐ Apply Filter to Search [Search](#) [Reset](#) [Show Filter](#)

Filter

Last Name [+](#)

[Search](#) [Reset](#) [Hide Filter](#)

Search Results for Harmony People

People ID	Last Name	Suffix	First Name	Middle Name	DOB	Gender	Race	SSN	Date of Death	Participant Photo	Report
10001	Werks		Cheryl		10/11/1945	Female		XXX-XX-6789			Prior Involvement Report

Names

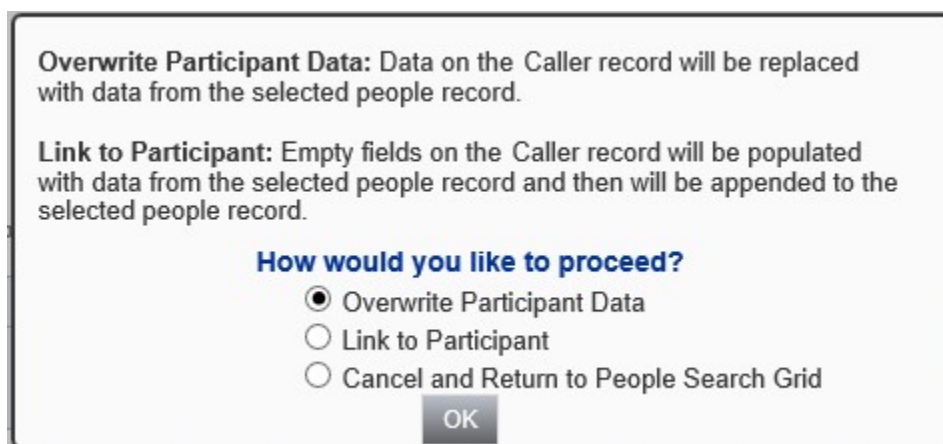
Name Type	First Name	Last Name	Middle Name	Is Primary?	Is Active?	Start Date	End Date	Display?
Main	Cheryl	Smith		<input type="checkbox"/>	<input type="checkbox"/>	3/26/2014		<input type="checkbox"/>
Main	Cheryl	Werks		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	11/12/2019		<input checked="" type="checkbox"/>

People Search Page

Note: Use the expansion grid to see all matching names. The search results initially show the person's name that is marked as Primary, as visible in the expansion grid.

In the example shown above, the search results show a person named "Cheryl Werks." The expansion grid shows another associated name, "Cheryl Smith." This people record includes both names, but the primary name is the one first displayed.

- To further filter the search results, select the Apply Filter to Search option in the Search section and build your filters in the Filter section.
- If the results return a matching record, click to select it in the list view. A popup message will appear.



Overwrite Participant Data: Data on the Caller record will be replaced with data from the selected people record.

Link to Participant: Empty fields on the Caller record will be populated with data from the selected people record and then will be appended to the selected people record.

How would you like to proceed?

☒ Overwrite Participant Data

☐ Link to Participant

☐ Cancel and Return to People Search Grid

[OK](#)

The feature allows you to determine how you will use the matching record.

- **Overwrite Participant Data** — The people record will be copied into the participant record and will overwrite any data already captured in the record. The Name, Address, and Email that are flagged as Active and Display along with the DOB, Gender, Race, SSN, and Ethnicity, will populate the participant record. The phone

number with the phone type of Home1, Work, Cell phone that are flagged as primary and active will also populate the participant record. This is the default setting.

- **Link to Participant** -- Use this option when the caller has participant information that is not already listed in the people record. The people record will be linked to the participant record. Data already entered into the participant record will not be overwritten with the data from the people record, but the People ID will be linked to the participant record and the data will be appended to the people record.

The record may contain more information than you see in the search results, but all available participant information will be available in the saved Call record.

Overview of PCOC Process

The screening process can be completed in two ways: the self-selection method via the web online assessment form or within the WellSky Human Services solution.

Online Self-Assessment



Role: Prospective Consumer and/or Caller on behalf of the Prospective Consumer

From the PCOC website, the prospective consumer and/or caller will click on the link to the self-assessment.

Contact Information

1. Indicate if filling out the form for self OR for another individual.

MyOptionsRI LTSS Needs Self-Assessment

If you or someone you care for is an older adult or a person living with a disability, this assessment questionnaire will help identify any long-term care needs and the options for services and supports in Rhode Island that could help meet them. The results of the assessment will also tell you if you qualify for more in-depth person-centered options counseling (PCOC) and how to connect for this important service with a long-term services and supports (LTSS) specialists. PCOC will give you the chance to discuss your needs and goals with a specialist trained in LTSS. If your situation requires assistance right away, please call the POINT at (401)462-4444. If you are Medicaid eligible, living in a nursing home and would like assistance leaving, please contact the Nursing Home Transition Program at (401)462-6393 or by email at OHHS.OCP@ohhs.ri.gov.

Required questions are marked with a red **required** label.

CONTACT INFORMATION

Please select one of the following options:

☒ *Unanswered*

☐ I am completing this form for myself.

☐ I am completing this form for another individual.

[Online Self-Assessment Page](#)

Self

2. When **I am completing this form for myself** is checked, questions will display.

CONTACT INFORMATION

Please select one of the following options:

☐ Unanswered

☒ I am completing this form for myself.

☐ I am completing this form for another individual.



Information for the Person

First Name required

Enter response...

Middle Initial

Enter response...

Last Name required

Enter response...

Date of Birth

Enter response...



Race

☒ Unanswered

☐ Asian

☐ Black or African American

☐ American Indian/Alaska Native

☐ Native Hawaiian/Pacific Islander

☐ White

☐ Some Other Race

What is your preferred language?



Would you like to have a person who speaks your preferred language help you at no cost when you are contacted by the office?

☒ Unanswered

☐ Yes

☐ No

Street Address

Enter response...

Address #2

Enter response...

City

Enter response...

State

Enter response...

Zip Code

Enter response...

Preferred Method of Contact

☒ Unanswered

☐ Phone

☐ Email

☐ I do not wish to be contacted

Contact Information Section: Self

Caller

- If **I am completing this form for another individual** is checked, these questions will display for the caller to complete.

CONTACT INFORMATION

Please select one of the following options:

☐ Unanswered
 ☐ I am completing this form for myself.
 ☒ I am completing this form for another individual.

Submitter Information

Your First Name required
 Enter response...

Your Last Name required
 Enter response...

Relationship to the Person you are contacting us about

☒ Unanswered
 ☐ Caregiver
 ☐ Church
☐ Community Organization
 ☐ Physician/Provider
 ☐ Police
☐ Relative/Friend
 ☐ Request to be Anonymous
 ☐ Self

Your Preferred Method of Contact required

☒ Unanswered
 ☐ Phone
 ☐ Email
☐ I do not wish to be contacted

Information for the Person

First Name required
 Enter response...

Middle Initial
 Enter response...

Last Name required
 Enter response...

Date of Birth
 Enter response... !!!

Gender

☒ Unanswered
 ☐ Male
 ☐ Female
☐ Gender Non-Conforming
 ☐ Trans Female
 ☐ Trans Male
☐ Client Refused

Race

☒ Unanswered
 ☐ Asian
 ☐ Black or African American
☐ American Indian/Alaska Native
 ☐ Native Hawaiian/Pacific Islander
 ☐ White
☐ Some Other Race

Street Address
 Enter response...

Address #2
 Enter response...

City
 Enter response...

State
 Enter response...

Zip Code
 Enter response...

Preferred Method of Contact

☒ Unanswered
 ☐ Phone
 ☐ Email
☐ I do not wish to be contacted

Contact Information for Caller & Prospective Consumer

Information on Prospective Consumer

The subsequent sections of the assessment are recording information about the Prospective Consumer.

Are you or the person you are contacting us about:

A Rhode Island resident who lives in the state more than 1/2 a year? **required**

- ☒ Unanswered ☐ Yes ☐ No but plan on becoming a resident
☐ No

A youth with an intellectual/developmental disability or a serious, chronic and disabling condition who is turning age 19 or 21? **required**

- ☒ Unanswered ☐ Yes ☐ No ☐ Unknown

Expected to need health care services and supports for a period that is likely to last more than a month?

- ☒ Unanswered ☐ No ☐ Yes

Have any of the following health conditions, illnesses or disabilities caused this need for services and supports: **required**

All / None

- | | | |
|---|---|--|
| <input type="checkbox"/> A COVID infection and treatment | <input type="checkbox"/> Accident or injury requiring medical treatment (e.g., broken limbs, pneumonia, accident injuries) | <input type="checkbox"/> A chronic medical condition (e.g. heart disease, diabetes, cancer, asthma, stroke, MS) |
| <input type="checkbox"/> An intellectual/developmental disability (occurring before age 18) | <input type="checkbox"/> Physical condition or disability affecting mobility or functioning (e.g., para or quadriplegic, neuromuscular disability, etc) | <input type="checkbox"/> Substance use disorder (e.g., alcohol, Rx abuse, illegal drugs) |
| <input type="checkbox"/> Memory loss (alzheimer's, dementia) | <input type="checkbox"/> Acquired traumatic brain injury (over age 18) | <input type="checkbox"/> Serious and persistent behavioral health condition (e.g., depression, bipolar, compulsive disorders, schizophrenia) |
| | | <input type="checkbox"/> None |

Receive any of the following care within the last month: All / None

- | | | |
|--|--|--|
| <input type="checkbox"/> Treatment of a wound or pressure ulcer by a health professional | <input type="checkbox"/> At home health care | <input type="checkbox"/> Daily monitoring by a skilled nurse (LPN or RN) |
| <input type="checkbox"/> Physical Therapy and/or occupational therapy | <input type="checkbox"/> In patient psychiatric care | <input type="checkbox"/> Treatment with IV medication |
| | <input type="checkbox"/> Hospital stay of 3 days or more | <input type="checkbox"/> Treatment for a substance use disorder |

Experience a fall within the last month

- ☒ Unanswered ☐ No ☐ Yes

Are you or the person you are contacting us about currently living in a nursing home and would like assistance leaving the nursing home?

- ☒ Unanswered ☐ Yes ☐ No

HEALTH COVERAGE

Health Insurance Information: Do you or the person you are contacting us about have any of the following types of health coverage? Please check all that apply. **required** All / None

- | | | |
|---|--|--|
| <input type="checkbox"/> VA Health Coverage | <input type="checkbox"/> Medicare | <input type="checkbox"/> Private or Employer Insurance |
| <input type="checkbox"/> HealthSource RI Plan | <input type="checkbox"/> Rhody Health Partners or Rite Care Plan | <input type="checkbox"/> Medicaid All Other |
| | | <input type="checkbox"/> Medicaid LTSS |
| <input type="checkbox"/> Medicaid Application Pending | <input type="checkbox"/> Uninsured | <input type="checkbox"/> Unknown |

FINANCIAL INFORMATION

Do you or the person you are contacting us about receive any of the following? **required** All / None

- | | | |
|--|---|--|
| <input type="checkbox"/> Social Security Disability Insurance (SSDI) | <input type="checkbox"/> Supplemental Security Income (SSI) | <input type="checkbox"/> Veterans Administration (VA) Benefits |
| | <input type="checkbox"/> Other | <input type="checkbox"/> None |
| <input type="checkbox"/> Retirement, Survivors and Disability Insurance (RSDI) | <input type="checkbox"/> Pension or Retirement Plan | |

Which of the following best describes the income you/the person have on a monthly basis? **required**

- | | | |
|---|---|---|
| <input checked="" type="radio"/> Unanswered | <input type="radio"/> Less than \$2,300 / month | <input type="radio"/> Between \$2,300 - \$4,500 / month |
| <input type="radio"/> Between \$4,500 - \$8,500 / month | <input type="radio"/> Over \$8,500 / month | <input type="radio"/> Unknown |

Are you or the person you are contacting us about married? If so, and tell us the combined total resources/assets of both spouses when responding to the question below.

- ☒ Unanswered ☐ Yes ☐ No

LIVING ARRANGEMENT

Which of the following best describes where you/the person live(s) now? **required**



If you/the person reside(s) in a home-like setting (house, apartment, condo, etc.), which of the following best describes who else lives there?

- | | | |
|--|---|--|
| <input checked="" type="radio"/> Unanswered | <input type="radio"/> No one, live alone | <input type="radio"/> Spouse/partner only |
| <input type="radio"/> Spouse/partner and Child | <input type="radio"/> Sibling(s) | <input type="radio"/> Adult child/children |
| <input type="radio"/> Minor child/children | <input type="radio"/> Other relatives/friends | |

ASSISTANCE WITH DAILY ACTIVITIES

Instructional Text

In this section, we would like to know more about the areas of daily life where some type of assistance may be needed by you or the person you are contacting us about.

Do you/the person need help on most days with any of the following: (Check all that apply)

Bathing (e.g., getting in and out of a shower/tub, using faucets, hair/body toweling)

☐ Yes ☐ No

Dressing (e.g., putting on/taking off clothes, socks, shoes, or stockings)

☐ Yes ☐ No

Toileting (e.g., getting on or off the toilet, wiping, or changing pads)

☐ Yes ☐ No

Eating (e.g., eat, drink, using utensils, chewing/swallowing)

☐ Yes ☐ No

Grooming (e.g., brushing teeth, combing hair, shaving, cutting nails)

☐ Yes ☐ No

Managing Medications (e.g., filling prescriptions, taking pills/medicines as directed, keeping meds organized)

☐ Yes ☐ No

Moving About (e.g., going from room to room or outside and back in without a walker or other assistive device)

☐ Yes ☐ No

Physical transitions (e.g., getting up from or moving between a bed, a chair/wheelchair, or toilet without help)

☐ Yes ☐ No

Housekeeping (e.g., general cleaning, dusting/vacuuming, washing dishes)

☐ Yes ☐ No

Preparing Meals (e.g., planning, cooking, serving and clean-up)

☐ Yes ☐ No

Shopping (e.g., grocery, clothes, prescriptions)

Laundry (e.g., using washer/dryer, folding, putting laundry away)

☐ Yes ☐ No

Handling Mail (e.g., opening, reading, responding)

☐ Yes ☐ No

Managing Money (e.g., keeping accounts, paying bills, handling cash)

☐ Yes ☐ No

Assistive Devices [All / None](#)

☐ Uses a Cane

☐ Rollator

☐ Uses a walker

☐ Wheel-chair reliant

☐ Needs assistance moving

☐ Other

☐ Falls or is at risk of falling

4. At the end of the form, click **Submit**.

By checking this box, I hereby authorize the use or disclosure of my protected health information as described above.

☒ Yes ☐ No



Thank you for completing the LTSS needs assessment questionnaire. Click "Submit" to receive the results and find out more about contacting an LTSS specialist for person-centered options counseling. If you would prefer not to submit the questionnaire, click "Cancel".



✓ Submit

✗ Cancel

Print

[Online Self-Assessment Page](#)

5. A message will display on the screen, letting the individual know that the submission was successful. A record number is provided for their reference. The message allows you the option to return to the RI EOHHS website or print the information submitted.

Success!

Please keep this reference number for your records: **10667**

[Return to Rhode Island EOHHS](#)

Print

[Success Message](#)

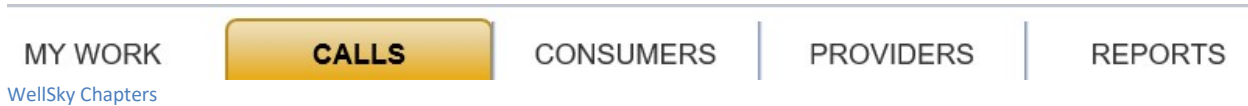
Online Self-Assessment Submission

PCOC Supervisors will be monitoring online submissions and assigning MyOptions Advisors to follow up with the prospective consumer and/or caller.

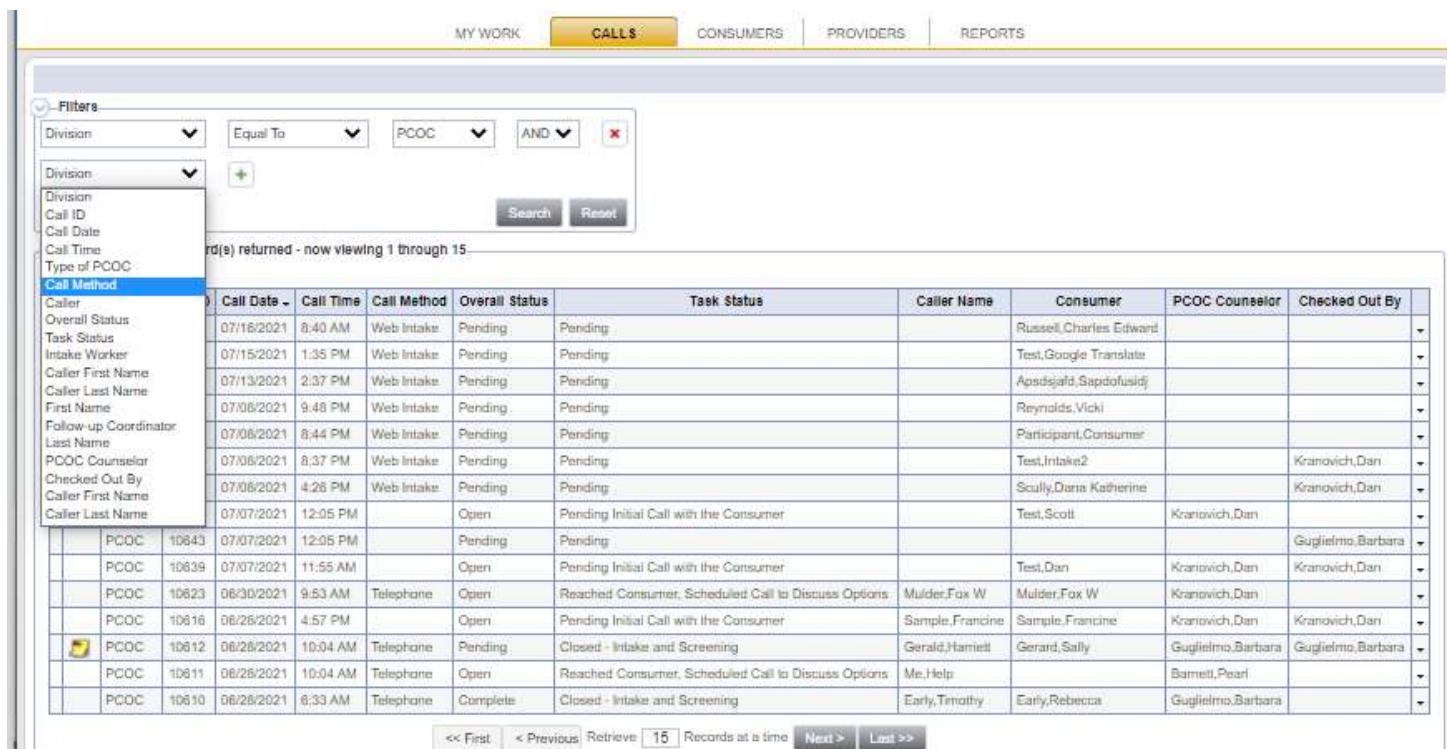


Role: PCOC Supervisor

1. After logging into WellSky, click on the Calls Chapter.



2. Redefine the Advanced Search filter by selecting Call Method.



MY WORK **CALLS** CONSUMERS PROVIDERS REPORTS

Filters

Division: [v] Equal To: [v] PCOC: [v] AND: [v] [X]

Division: [v] +

Search [v] Reset [v]


rd(s) returned - now viewing 1 through 15

Call Date	Call Time	Call Method	Overall Status	Task Status	Caller Name	Consumer	PCOC Counselor	Checked Out By
07/16/2021	8:40 AM	Web Intake	Pending	Pending		Russell, Charles Edward		
07/15/2021	1:35 PM	Web Intake	Pending	Pending		Test, Google Translate		
07/13/2021	2:37 PM	Web Intake	Pending	Pending		Apdsjald, Sapdofusidj		
07/06/2021	9:48 PM	Web Intake	Pending	Pending		Reynolds, Vicki		
07/06/2021	8:44 PM	Web Intake	Pending	Pending		Participant, Consumer		
07/06/2021	8:37 PM	Web Intake	Pending	Pending		Test, Intake2		Kranovich, Dan
07/06/2021	4:26 PM	Web Intake	Pending	Pending		Scully, Dana Katherine		Kranovich, Dan
07/07/2021	12:05 PM	Open	Pending Initial Call with the Consumer		Test, Scott		Kranovich, Dan	
PCOC 10643	07/07/2021	12:05 PM	Pending	Pending				Guglielmo, Barbara
PCOC 10639	07/07/2021	11:55 AM	Open	Pending Initial Call with the Consumer		Test, Dan	Kranovich, Dan	Kranovich, Dan
PCOC 10623	06/30/2021	9:53 AM	Telephone	Open	Reached Consumer, Scheduled Call to Discuss Options	Mulder, Fox W	Mulder, Fox W	Kranovich, Dan
PCOC 10616	06/26/2021	4:57 PM	Open	Pending Initial Call with the Consumer		Sample, Francine	Sample, Francine	Kranovich, Dan
PCOC 10612	06/26/2021	10:04 AM	Telephone	Pending	Closed - Intake and Screening	Gerald, Harriett	Gerard, Sally	Guglielmo, Barbara
PCOC 10611	06/26/2021	10:04 AM	Telephone	Open	Reached Consumer, Scheduled Call to Discuss Options	Me, Help		Barnett, Pearl
PCOC 10610	06/26/2021	6:33 AM	Telephone	Complete	Closed - Intake and Screening	Early, Timothy	Early, Rebecca	Guglielmo, Barbara

<< First < Previous Retrieve: 15 Records at a time Next > Last >>

Calls Advanced Search Filter

3. Click on the + plus sign.
4. Select **Web Intake** from the dropdown list and click **Search**.


WellSky Human Services

Welcome, Barbara Guglielmo
 7/18/2021 11:26 AM

Queue Search Sign Out

Role
 PCOC Supervisor

File

Quick Search

 Calls
 Call ID
 GO
 [ADVANCED SEARCH](#)

MY WORK **CALLS** CONSUMERS PROVIDERS REPORTS

Filters
 Division Equal To PCOC AND
 Call Method Equal To Web Intake AND
 Division
 Search Reset

15 Queue Search record(s) returned - now viewing 1 through 15

	Division	Call ID	Call Date	Call Time	Call Method	Overall Status	Task Status	Caller Name	Consumer	PCOC Counselor	Checked Out By
	PCOC	10667	07/16/2021	8:40 AM	Web Intake	Pending	Pending		Russell, Charles Edward		
	PCOC	10666	07/15/2021	1:35 PM	Web Intake	Pending	Pending		Test, Google Translate		
	PCOC	10659	07/13/2021	2:37 PM	Web Intake	Pending	Pending		Apsdsgfd, Sapdofusidj		
	PCOC	10650	07/08/2021	9:48 PM	Web Intake	Pending	Pending		Reynolds, Vicki		
	PCOC	10649	07/08/2021	8:44 PM	Web Intake	Pending	Pending		Participant, Consumer		
	PCOC	10648	07/08/2021	8:37 PM	Web Intake	Pending	Pending		Test, Intake2		Kranovich, Dan
	PCOC	10647	07/08/2021	4:26 PM	Web Intake	Pending	Pending		Scully, Dana Katherine		Kranovich, Dan
	PCOC	10580	06/17/2021	11:00 AM	Web Intake	Pending	Pending		Test, Jim Q		Guglielmo, Barbara
	PCOC	10557	06/09/2021	11:35 AM	Web Intake	Pending	Pending		Consumer, Test		Barnett, Pearl
	PCOC	10535	06/02/2021	10:54 AM	Web Intake	Pending	Pending		Zone, Fro		Kranovich, Dan
	PCOC	10495	05/19/2021	4:36 PM	Web Intake	Pending	Pending		Test, Test		
	PCOC	10497	05/19/2021	4:27 PM	Web Intake	Pending	Pending		Naimath, Joe Broadway		
	PCOC	10487	05/18/2021	8:37 AM	Web Intake	Pending	Pending	Holland, Tom Stanley			
	PCOC	10485	05/17/2021	9:56 AM	Web Intake	Pending	Pending		Jansen, Carole J		Guglielmo, Barbara
	PCOC	10344	04/06/2021	12:19 PM	Web Intake	Pending	Pending		Yasmeen, Frieda Y		Guglielmo, Barbara

<< First < Previous Retrieve 15 Records at a time Next > Last >>

Call Records Results



Note

Another indicator that a record needs a PCOC Counselor\MyOptions Advisor assigned is the PCOC Counselor field is blank. The filter can be modified by selecting PCOC Counselor Equal to Blank.

- The results will display with the latest online self-assessment. Click on the record to open.
- Select **Check Out Call** from File menu.

File	Tools	Reports	Word Merge
<div> <div> History Spell Check <u>Check Out Call</u> Print Close Call </div> <div> <div>PCOC</div> <div>07/16/2021</div> <div>08:40 AM</div> <div></div> <div></div> </div> </div>			
Associated Calls	Call Date *	07/16/2021	
Events	Call Time	08:40 AM	
Track Call Status	Call Method	Web Intake	
	Type of PCOC *	Intake/Screening	
	How did you hear about us?		
	In a crisis situation requiring immediate health care assistance?	<input type="checkbox"/>	
Reason for Call			
Details of Call			
Decision			
	Overall Status *	Pending *	
	Task Status *	Pending	
	Comments		
	PCOC Counselor		

[Call Details Page](#)

7. Click **OK**.

fwtest.harmonyis.net says

The Record Successfully Checked Out

OK

[Message Window](#)

- Click on the Participants subpage.
- From the Participant list grid, click on a participant.

File **Add Participant**

Call

Participants

Documentation

Notes

Associated Calls

Events

Track Call Status

Filters

Last Name

1 Participant(s) returned - now viewing 1 through 1

Last Name	First Name	Relationship to Prospective Consumer	Contact Type	City	State	Zip Code	Home Phone	Work Phone	Email	Age
Marshall	Stella		Consumer	Jamestown	Rhode Island					

First Previous Records per page 15 Next Last

Participant List Page

10. Select Search for Person from the Tools Menu.

File **Tools** **Reports**

Upload Photo

Search for Person

Copy Address From Consumer

Add as Consumers

☒

Stella

Click Search for Person from Tools Menu

11. The People Search window will display.

File

Search

☐ Apply Filter to Search

Filter

Last Name Begins With Marshall AND

First Name Begins With Stella AND

Last Name

People Search

12. Click **Search**.

13. If no results return, Select **Close People Search** from the File menu.

14. If results return, verify that the people record in the grid is the same person. If so, click on the name in the results grid.

WellSky Human Services

Call ID = 10729 - Stella Marshall **People Search**
8/3/2021 4:04 PM

File

Search

☐ Apply Filter to Search

Filter

Last Name Begins With Marshall AND

First Name Begins With Stella AND

Last Name

Overwrite Participant Data: Data on the Consumer record will be replaced with data from the selected people record.

Link to Participant: Empty fields on the Consumer record will be populated with data from the selected people record and then will be appended to the selected people record.

How would you like to proceed?

☒ Overwrite Participant Data

☐ Link to Participant

☐ Cancel and Return to People Search Grid

Search Results for Harmony People

Last Name	People ID	First Name	Middle Name	Suffix	DOB	Gender	Race	SSN	Contact ID	Member ID	Case No	Person Type	Date of Death	Participant Photo
Marshall	10029	Stella				Female	White					Participant		

People Search

The feature allows you to determine how you will use the matching record.

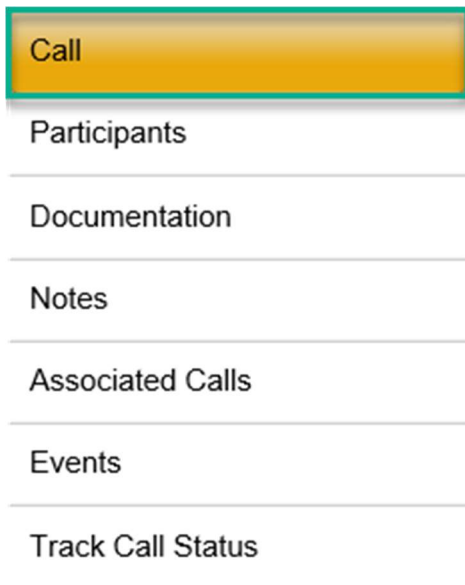
- a. **Overwrite Participant Data** — The people record will be copied into the participant record and will overwrite any data already captured in the record. The Name, Address, and Email that are flagged as Active and Display along with the DOB, Gender, Race, SSN, and Ethnicity, will populate the participant record. The phone number with the phone type of Home1, Work, Cell phone that are flagged as primary and active will also populate the participant record. This is the default setting.
- b. **Link to Participant** -- Use this option when the caller has participant information that is not already listed in the people record. The people record will be linked to the participant record. Data already entered into the participant record will not be overwritten with the data from the people record, but the People ID will be linked to the participant record and the data will be appended to the people record.

15. Make a selection and click **OK**.

16. From the Call Participant Details page, Select **Save and Close (Caller, Consumer or Other Contact)** from the File menu.

17. Repeat steps 9-15 for other call participants.

18. Click on the Call Subpage.

A screenshot of a software interface showing a vertical list of menu items. The top item, 'Call', is highlighted with a yellow background and a green border. Below it are 'Participants', 'Documentation', 'Notes', 'Associated Calls', 'Events', and 'Track Call Status', each separated by a horizontal line.

Call

Participants

Documentation

Notes

Associated Calls

Events

Track Call Status

[Call Subpages](#)

19. On the Call Details page, complete the following:

File Tools Reports Word Merge

Call	Call Information
Participants	Division <input type="text" value="PCOC"/>
Documentation	Date of Initial Contact * <input type="text" value="07/16/2021"/>
Notes	Time of Initial Contact * <input type="text" value="08:40 AM"/>
Associated Calls	Intake and Screening Worker * <input type="text" value=""/>
Events	Call Date * <input type="text" value="07/16/2021"/>
Track Call Status	Call Time <input type="text" value="08:40 AM"/>
	Call Method <input type="text" value="Web Intake"/>
	Type of PCOC * <input type="text" value="Intake/Screening"/>
	How did you hear about us? <input type="text" value=""/>
	In a crisis situation requiring immediate health care assistance? <input type="checkbox"/>
	Reason for Call
	Details of Call <input type="text" value=""/>
	Decision
	Overall Status * <input type="text" value="Pending"/>
	Task Status * <input type="text" value="Pending"/>
	Comments <input type="text" value=""/>
	PCOC Counselor <input type="text" value=""/>

Call Details Page

- Intake and Screening Worker:** Select the **Web Intake, Worker** from dropdown list.
- PCOC Counselor:** Select the worker from dropdown list.

20. Select **Save, Check In and Close Call** from File menu.



Note

Assigned PCOC Counselor\MyOptions Advisor will see the Web Intake Submission on their Call Records grid when they navigate to the Calls Chapter. Refer to section, **Online Self-Assessment Record and PCOC Process**, page 47.

Practice #1 Exercise



Practice Exercise #1

1. Complete an online self-assessment.
2. Open the Web Intake record from the Calls Chapter.
3. Assign record to a worker.

Add Call in WellSky

PCOC Staff will enter calls received by logging into WellSky.



Role: PCOC Worker

1. After logging into WellSky, click on the Calls Chapter.



2. Select **Add Call** from the File menu.
3. The Add Call details page will display.

Call Information

- Call Information

Entry Date*	06/28/2021	Entry Time*	6:33 AM
Call Date*	6/28/2021	Start Time*	06 : 33 AM
		End Time*	:
Call Method		Type of PCOC*	
Intake and Screening Worker*	Guglielmo, Barbara ... Clear	How did you hear about us?	
Overall Status*	Open		
Confidential	<input type="checkbox"/>		

[Add Call > Calls Information](#)

1. This section captures information about the call. Fields with an asterisk * are required.
2. Select a value for the **Call Method**.
3. Select a value for **Type of PCOC**.
4. Select a value for **How did you hear about us?**

Note

Fields with a red asterick *: The field is required.



Confidential/Restricted: When selected, this checkbox makes the record only available to workers whose names are directly associated with the call. System administrators and the supervisors of these workers are also able to open and view the record.

Caller

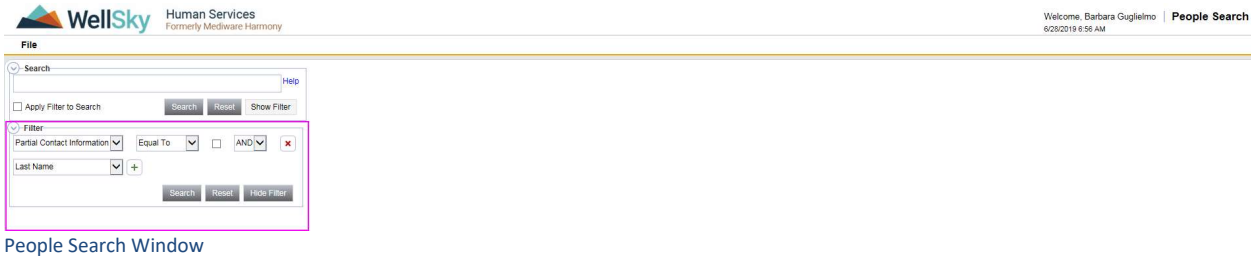
1. This section captures information on the caller.
2. Click **Search** to add the caller's information.

- Caller


Search Clear

[Click Search for Caller.](#)

- The People Search window will display.
- Enter the name of the caller, by using the Search text box or configuring the filter by First and Last Names. Click **Search**.

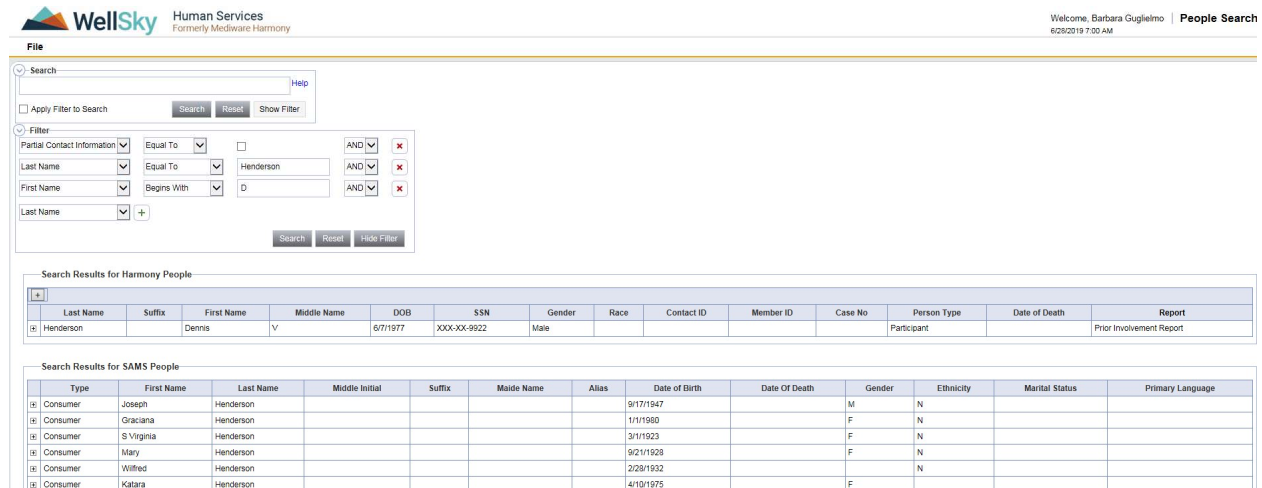


People Search Window

- Select a field from the dropdown down and click on the  and enter the value in the text box.
- Once filter is established, click **Search**.

If Results Yield a Match

- The search results display in two list view grid. The first grid identifies people that are in the WellSky database. The second grid identifies people that are in the SAMS database.



Search Results for Harmony People

Last Name	Suffix	First Name	Middle Name	DOB	SSN	Gender	Race	Contact ID	Member ID	Case No	Person Type	Date of Death	Report
Henderson		Dennis	V	6/7/1977	XXX-XX-9922	Male					Participant		Prior Involvement Report

Search Results for SAMS People

Type	First Name	Last Name	Middle Initial	Suffix	Maide Name	Alias	Date of Birth	Date Of Death	Gender	Ethnicity	Marital Status	Primary Language
Consumer	Joseph	Henderson					9/17/1947		M	N		
Consumer	Graciana	Henderson					1/1/1980		F	N		
Consumer	S Virginia	Henderson					3/1/1923		F	N		
Consumer	Mary	Henderson					9/2/1928		F	N		
Consumer	Wilfred	Henderson					2/28/1932			N		
Consumer	Katara	Henderson					4/10/1975		F			

People Search Page

Note:

If a person is selected from the SAMS grid, it will create a people record in WellSky. The next time a search is conducted on that person, their people record will display in the Harmony (WellSky) grid.

- Click name in search results grid.

File

Search
Rodgers

Apply Filter to Search

Filter:
Partial Contact Information

Last Name

Search Results for Harmony People

	Last Name	People ID	First Name	Middle Name	Suffix	DOB	Gender	Race	SSN	Contact ID	Member ID	Case No	Person Type	Date of Death	Participant Photo
<input type="checkbox"/>	Rodgers	10099	Julia			8/31/1949	Female	White	454-51-1554				Participant		
<input type="checkbox"/>	Rodgers	10100	Patrick	L		8/8/1979	Male	White	565-95-9595				Participant		
<input type="checkbox"/>	Rodgers	10174	Shariene				Female	Black or African American					Participant		
<input type="checkbox"/>	Rodgers	10470	Cecilia	L		12/16/1975	Female	White					Participant		

Click name in search results grid.

7. A message will display.

Overwrite Participant Data: Data on the Caller record will be replaced with data from the selected people record.

Link to Participant: Empty fields on the Caller record will be populated with data from the selected people record and then will be appended to the selected people record.

How would you like to proceed?

☒ Overwrite Participant Data
☐ Link to Participant
☐ Cancel and Return to People Search Grid

People Search message displays.

8. Click **OK**. The People Search window will close and return the user to the Add Call page.

9. The information from the individual's People record will display in the Caller's section.

Caller
Search
Clear

Anonymous ☐

Last Name Middle Initial First Name

Street

Street2

City State Zip Code

Contact Phone

Surrogate Legal Status


Relationship to Prospective Consumer

Consumer Case No

Language Spoken Interpreter/Translator Needed? ☐

Add Caller>Caller Section

If Results Do Not Yield a Match


Human Services
Formerly Medware Harmony

Welcome, Barbara Guglielmo | **People Search**
6/25/2019 7:09 AM

File

Search

☐ Apply Filter to Search

Search
Reset
Show Filter

Filter:

Partial Contact Information

Last Name

First Name

Last Name

Equal To

Equal To

Equal To

Morris

Michelle

AND

AND

AND

X

X

X

Search

Reset

Hide Filter

Search Results for Harmony People

Search Results for SAMS People

People Search

10. If your search does not result in any matches, select Close People Search from File menu.

File

Print

Close People Search

File>Close People Search

11. The People Search window will close and return the user to the Add Call Details page.

12. Complete the necessary information in the section.

- **Caller**
Search
Clear

Anonymous
☐

Last Name
Middle Initial
First Name

Street
Copy Address From

Street2

City
State
Zip Code
Clear

Contact Phone

Surrogate Legal Status

Relationship to Prospective Consumer

Consumer Case No

Language Spoken
Interpreter/Translator Needed?

Add Caller>Caller Section

Prospective Consumer

13. To add a prospective consumer, click **Add**.

-
Consumer
Add
Edit
Delete

To add a prospective consumer, click Add.

Add New Consumer Information
Search
Clear

Primary
☒

Caller is Consumer
☐

Last Name*
Middle Initial
First Name*

Address Type

Street
Copy Address From

Street2

City
Clear
State
Clear
Zip Code*
Clear

Contact Phone*
Email Address

Gender*
Race
Ethnicity

Date of Birth
Age at Call

Age Estimated

Surrogate Legal Status

Legal Status

Marital Status*

Language Spoken
Interpreter/Translator Needed?
☐

Consumer Case No

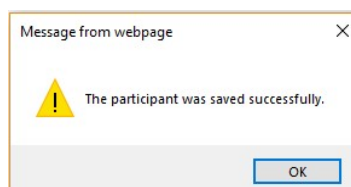
Add Call>Prospective Consumer

14. If the prospective consumer is also the caller, check **Caller is Prospective Consumer**.

15. If not, follow steps 8-17.

16. When complete, select **Save and Close Consumer** from the File menu.

17. A message will display. Click **OK**.



Participant saved successfully.



Note

If the consumer is new to the system, you can use the Copy Address From. When selected, a new window will appear with the address of other persons related to the call (Caller, Other Contact). Select an address from the grid. The window will close and the address will appear for the prospective consumer.

Reason for Call

1. Enter reason for call in the Details of Call textbox.
2. If the individual is experiencing a crisis, check the box for **In a crisis situation requiring immediate health care assistance?**

- Reason For Call

Details of Call

In a crisis situation requiring immediate health care assistance? ☐

Contacts

1. To record additional persons, click **Add**.

-
Contacts

Add

Edit

Delete

To record additional persons, click Add.

2. Enter the necessary information.

File

Spell Check - Save Contact - Save and Close Contact - Close Contact

Add New Contact Information
Search Clear

Last Name
Middle Name
First Name

Address Type

Street

Copy Address From

Street2

City

Clear

State

Clear

Zip Code

Clear

Contact Phone
Email Address

Relationship to Prospective Consumer

Case No

Add Call>New Contact

- When complete, select **Save and Close Contact** from the File menu.

Decision

- No changes are needed in the Decision section.

- Decision

Task Status*

Pending Initial Call with the Consumer

Comments

PCOC Counselor*

Guglielmo, Barbara

...

Clear

Division

PCOC

Add Call>Decision

To continue working with the call record:

- When complete, Select **Save, Close and Edit Call** from the File menu.

To submit the call record and work on it in the future:

- When complete, Select **Save, Check In and Close Call** from the File menu.



Note

Do not use the browser window close button (X) to close records. Unsaved changes will be lost and cannot be retrieved.




File menu options from the Add Call page

- **Save** – This option saves any changes to the Call form since the last save. This can be completed at any time while working with the Call form and will not close the Call form.
- **Save and Close** – This option saves any changes to the Call form since the last save and closes it. The Call record is still checked out to the Worker, so no other workers can modify the record until it is checked back in.
- **Save, Close, and Check-In** – This option saves any changes to the Call form since the last save, closes it, and checks in the record. If another worker needs to edit the record, they can check it out.
- **Save, Close, and Edit** – This option saves any changes to the Call form since the last save, closes the form, and opens the record in edit mode.

If continuing to work with the call record:

4. The Call Details page will display.



Call ID = 10192 - Jason Vanderbilt | **Call**
 Last Updated by bguglielmo
 at 3/7/2021 9:40:22 PM

File	Tools	Reports	Word Merge
<div style="background-color: #f4a460; padding: 5px; margin-bottom: 5px;">Call</div> <div style="padding: 5px; margin-bottom: 5px;">Participants</div> <div style="padding: 5px; margin-bottom: 5px;">Documentation</div> <div style="padding: 5px; margin-bottom: 5px;">Notes</div> <div style="padding: 5px; margin-bottom: 5px;">Associated Calls</div> <div style="padding: 5px; margin-bottom: 5px;">Referrals</div> <div style="padding: 5px; margin-bottom: 5px;">Events</div> <div style="padding: 5px;">Track Call Status</div>	<div style="background-color: #d9e1f2; padding: 5px; margin-bottom: 5px;">Call Information</div> <div style="padding: 5px; margin-bottom: 5px;"> Date of Initial Contact * 12/14/2020 </div> <div style="padding: 5px; margin-bottom: 5px;"> Time of Initial Contact * 08:20 AM </div> <div style="padding: 5px; margin-bottom: 5px;"> Intake and Screening Worker * Guglielmo, Barbara ▼ </div> <div style="padding: 5px; margin-bottom: 5px;"> Call Date * 12/14/2020 </div> <div style="padding: 5px; margin-bottom: 5px;"> Call Time 08:20 AM </div> <div style="padding: 5px; margin-bottom: 5px;"> Call Method Telephone ▼ </div> <div style="padding: 5px; margin-bottom: 5px;"> Call Type * Information ▼ </div> <div style="padding: 5px; margin-bottom: 5px;"> How did you hear about us? Hospital Referral ▼ </div> <div style="background-color: #d9e1f2; padding: 5px; margin-bottom: 5px;">Decision</div> <div style="padding: 5px; margin-bottom: 5px;"> Overall Status * Open ▼* </div> <div style="padding: 5px; margin-bottom: 5px;"> Task Status * Pending PCOC Follow-Up/Close-Out ▼ </div> <div style="padding: 5px; margin-bottom: 5px;"> Comments <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div> </div> <div style="padding: 5px;"> PCOC Counselor Guglielmo, Barbara ▼ </div>		

Call Details page



For multiple prospective consumers (caller is reporting on their parents), go to page 52.

Practice #2 Exercise



Practice Exercise #2

1. Add a Call record.
2. Complete a People Search for Call Participants.
3. Save Call record.

Online Self-Assessment Record and PCOC Process

Online Self-Assessment records are available in the Calls Chapter. To access the record:

1. Click on the Calls Chapter.

MY WORK

CALLS

CONSUMERS

PROVIDERS

REPORTS

2. Select a record with a Call Method = **Web Intake** from the Call List Grid.

MY WORK CALLS CONSUMERS PROVIDERS REPORTS										
<div> <div>Filters</div> <div> <div>Overall Status</div> <div>Equal To</div> <div>Open</div> <div>AND</div> <div>Call ID</div> <div>+</div> <div>Search</div> <div>Reset</div> </div> </div>										
4 Queue Search record(s) returned - now viewing 1 through 4										
	Call ID	Call Date	Call Time	Call Method	Overall Status	Task Status	Caller Name	Prospective Consumer	Checked Out By	
	10192	12/14/2020	8:20 AM	Telephone	Open	Pending PCOC Follow-Up/Close-Out		Vanderbilt, Jason Arthur		
	10193	12/21/2020	8:02 AM	Telephone	Open	Pending PCOC Follow-Up/Close-Out	Rodgers, Cecilia L.	Lawson, Laura B	Schmidt, Dustin	
	10196	01/08/2021	2:08 PM	Telephone	Open	Pending PCOC Follow-Up/Close-Out	Harrison, David	Harrison, David	Ougliastro, Barbara	
	10223	02/15/2021	1:07 PM	Telephone	Open	Pending Initial Call with the Consumer	Sargent, Elizabeth	Miller, James R.		

[Call List Grid page](#)



The last column of the grid, **Checked Out By**, lets you know if another worker has the record checked out. If that is the case, you will be able to open the record to view only.

3. The Call Details page will display.
4. Select Check Out Call from File menu.
5. A People Search will need to be completed on the participants. Click OK.

fhri.gov

WellSky Human Services

FileToolsReportsWord Merge

Call Information

Division

Date of Initial Contact *

Time of Initial Contact *

Intake and Screening Worker *

Call Date *

Call Time

Call Method

Type of PCOC *

How did you hear about us?

In a crisis situation requiring immediate health care assistance?

Reason for Call

Details of Call

Decision

Overall Status *

Task Status *

Comments

PCOC Counselor

08:40 AM

Web Intake

Intake/Screening

Pending

Pending

Guglielmo, Barbara

Call ID = 10667 - Charles Russell

Last Updated by Admin

at 7/16/2021 8:40:04 AM

Call

fwtest.harmonyis.net says

A people search was not executed for the following:

Russell, Charles, Edward

Navigate to the Participants record and execute a people search to determine if the person is already known to your agency.

OK

Loading please wait

Message to do a People Search

6. Click on the Participants subpage.
7. From the Participants list page, click on a participant record.

WellSky Human Services Call ID = 10667 - Charles Russell | **Participants**
7/18/2021 11:55 AM

File Add Participant

Call

Participants

Documentation

Notes

Associated Calls

Events

Track Call Status

Filters

Last Name

1 Participants record(s) returned - now viewing 1 through 1

Last Name	First Name	Relationship to Prospective Consumer	Contact Type	City	State	Zip Code	Home Phone	Work Phone	Email	Age
Russell	Charles		Consumer	Block Island	Rhode Island	02806				63.5

First Previous Records per page 15 Next Last

[Participants List Page](#)

8. From the Participants Details page, Select **Search for Person** from the Tools menu.

WellSky Human Services Call ID = 10667 - Charles Russell | **Consumer**
Last Updated by Admin
at 7/16/2021 8:40:06 AM

File Tools Reports

Upload Photo

Search For Person

Add as Consumers

Refer for Services

Search For Person

Charles

Edward

Russell

Last Name

Address Type

Street

123 Corn Neck Road

[Select Search for Person from Tools Menu](#)

9. The People Search window will display. The search results display in two list view grid. The first grid identifies people that are in the WellSky database. The second grid identifies people that are in the SAMS database. Click Search.

WellSky Human Services Call ID = 10667 - Charles Russell | **People Search**
7/18/2021 11:59 AM

File

Search

☐ Apply Filter to Search

Filter

Last Name	Begins With	Russell	AND	<input type="button" value="X"/>
People ID	Equal To	11290	AND	<input type="button" value="X"/>
First Name	Begins With	Charles	AND	<input type="button" value="X"/>
Middle Name	Begins With	Edward	AND	<input type="button" value="X"/>
DOB	Equal To	01/17/1958	AND	<input type="button" value="X"/>
Race	Equal To	American Indian/Alaska Native	AND	<input type="button" value="X"/>
Partial Contact Information	Equal To	<input type="checkbox"/>	AND	<input type="button" value="X"/>
Phone	Equal To	(401)244-8444	AND	<input type="button" value="X"/>
Address Type	Equal To	Unknown	AND	<input type="button" value="X"/>
Street	Equal To	123 Corn Neck Road	AND	<input type="button" value="X"/>
City	Equal To	Block Island	AND	<input type="button" value="X"/>
State	Equal To	Rhode Island	AND	<input type="button" value="X"/>
Zip Code	Equal To	02806	AND	<input type="button" value="X"/>
Last Name				

[People Search Page](#)

If Results Yield No Match

9. If no records return, Click **Close People Search** from File menu.

File

Print
Close People Search

☐ Apply Filter to Search Search Reset Show Filter

Filter

Last Name	Begins With	Russell	AND	X
People ID	Equal To	11290	AND	X
First Name	Begins With	Charles	AND	X
Middle Name	Begins With	Edward	AND	X
DOB	Equal To	01/17/1958	AND	X
Race	Equal To	American Indian/Alaska Native	AND	X
Partial Contact Information	Equal To	<input type="checkbox"/>	AND	X
Phone	Equal To	(401)244-8444	AND	X
Address Type	Equal To	Unknown	AND	X
Street	Equal To	123 Corn Neck Road	AND	X
City	Equal To	Block Island	AND	X
State	Equal To	Rhode Island	AND	X
Zip Code	Equal To	02806	AND	X
Last Name				

Search Reset Hide Filter

Search Results for Harmony People


Last Name	People ID	First Name	Middle Name	Suffix	DOB	Gender	Race	SSN	Contact ID	Member ID	Case No	Person Type	Date of Death	Participant Photo
No records to display														

People Search Page

10. Select **Save and Close Consumer (or Caller)** from File menu.

If Results Yield a Match

10. The search results display in two list view grid. The first grid identifies people that are in the WellSky database. The second grid identifies people that are in the SAMS database.

 **WellSky** Human Services
Formerly Mediware Harmony

Welcome, Barbara Guglielmo | **People Search**
6/28/2019 7:05 AM

File

Search Help

☐ Apply Filter to Search Search Reset Show Filter

Filter

Partial Contact Information	Equal To	<input type="checkbox"/>	AND	X
Last Name	Equal To	Henderson	AND	X
First Name	Begins With	D	AND	X
Last Name				

Search Reset Hide Filter

Search Results for Harmony People

Last Name	Suffix	First Name	Middle Name	DOB	SSN	Gender	Race	Contact ID	Member ID	Case No	Person Type	Date of Death	Report
Henderson		Dennis	V	6/7/1977	XXX-XX-9922	Male					Participant		Prior Involvement Report

Search Results for SAMS People

Type	First Name	Last Name	Middle Initial	Suffix	Maide Name	Alias	Date of Birth	Date Of Death	Gender	Ethnicity	Marital Status	Primary Language
Consumer	Joseph	Henderson					9/17/1947		M	N		
Consumer	Graciana	Henderson					1/1/1980		F	N		
Consumer	S Virginia	Henderson					3/1/1923		F	N		
Consumer	Mary	Henderson					9/21/1928		F	N		
Consumer	Wilfred	Henderson					2/28/1932		N			
Consumer	Katara	Henderson					4/10/1975		F			

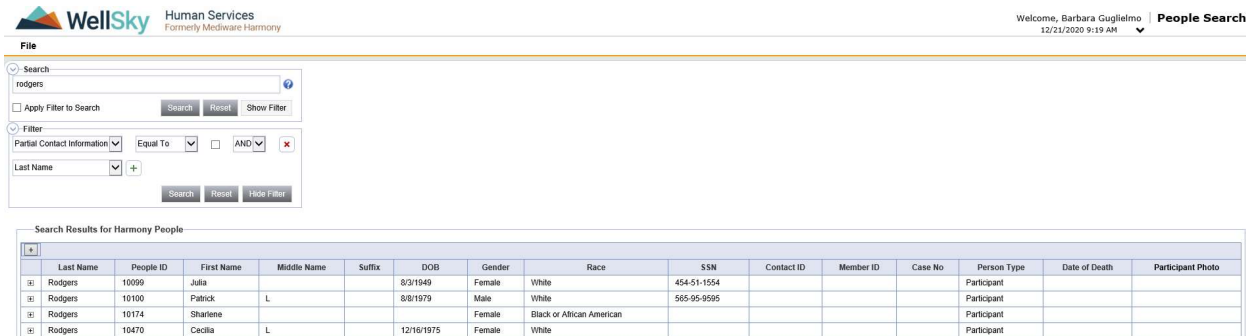
People Search Page



Note:

If a person is selected from the SAMS grid, it will create a people record in WellSky. The next time a search is conducted on that person, their people record will display in the Harmony (WellSky) grid.

11. Click name in search results grid.

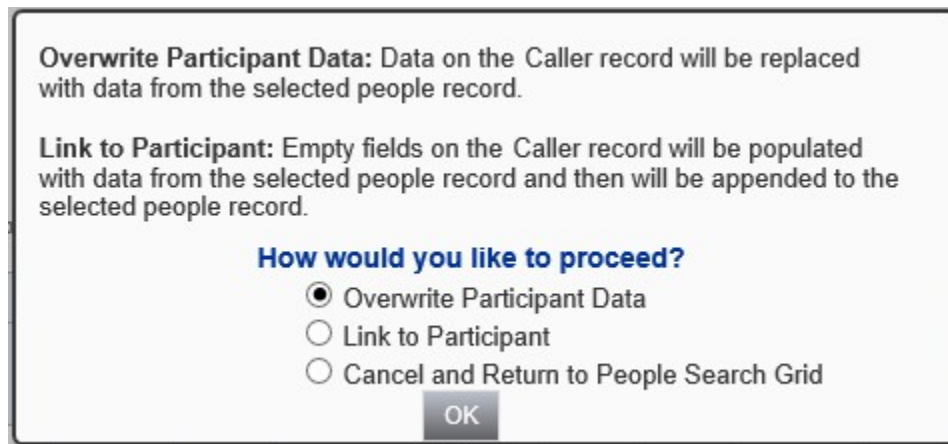


The screenshot shows the WellSky People Search interface. At the top, there's a search bar with 'Rodgers' entered. Below it, a filter section allows for refining the search. The main area displays a table of search results for 'Harmony People'.

Last Name	People ID	First Name	Middle Name	Suffix	DOB	Gender	Race	SSN	Contact ID	Member ID	Case No	Person Type	Date of Death	Participant Photo
Rodgers	10099	Julia			8/3/1949	Female	White	454-51-1554				Participant		
Rodgers	10100	Patrick	L		8/8/1979	Male	White	565-95-9595				Participant		
Rodgers	10174	Shariene				Female	Black or African American					Participant		
Rodgers	10470	Cecilia	L		12/16/1975	Female	White					Participant		

Click name in search results grid.

18. A message will display.



The screenshot shows a message dialog box with the following text:

Overwrite Participant Data: Data on the Caller record will be replaced with data from the selected people record.

Link to Participant: Empty fields on the Caller record will be populated with data from the selected people record and then will be appended to the selected people record.

How would you like to proceed?

- ☒ Overwrite Participant Data
- ☐ Link to Participant
- ☐ Cancel and Return to People Search Grid

At the bottom of the dialog is an 'OK' button.

People Search message displays.

19. If only partial information was provided from the web form and the existing record is more comprehensive, select **Overwrite Participant Data**.
20. If the information provided from the web form is different than the information in the existing record, select **Link to Participant**.
21. The People Search window will close and return you to the Participant Details page.
22. Select **Save and Close Consumer (or Caller)** from File menu.

Intake and Screening Tool

1. Click on **Documentation** to open the screening tool.
2. Select the **Intake and Screening Tool** from the list view grid.

File

Call
Participants
Documentation
Notes
Associated Calls
Events
Track Call Status

Filters
Participant


1 Documentation record(s) returned - now viewing 1 through 1

Document Date	Document Name	Document By	Status	Participant
07/16/2021	Intake & Screening Tool	Application, Harmony	Pending	

Records per page | 15 |

[Documentation list page](#)

- The Intake and Screening Tool will display.


WellSky Human Services

Call ID = 10667 - Charles Russell | **Documentation**
Last Updated by Admin
at 7/16/2021 8:40:06 AM

File

Intake & Screening Tool

Call Documentation
Document Date * 07/16/2021
Doc. By * Application, Harmony
Doc Name * Intake & Screening Tool
Status * Pending
Participant
Show Consumer ☐

[Intake & Screening Tool](#)

- Select a participant from the Participant dropdown list.
- Review the information provided.

CONSUMER STATUS

Are you or the person you are contacting us about:

A Rhode Island resident who lives in the state more than 1/2 a year?*	Yes
A youth with an intellectual/developmental disability or a serious, chronic and disabling condition who is turning age 19 or 21?*	No
Expected to need health care services and supports for a period that is likely to last more than a month?	No
Have any of the following health conditions, illnesses or disabilities caused this need for services and supports:*	<div> <div> A COVID infection and treatment Accident or injury requiring medical treatment A chronic medical condition (e.g. heart disease) An intellectual/developmental disability (occurs) Physical condition or disability affecting mobility Substance use disorder (e.g., alcohol, Rx abuse) Serious and persistent behavioral health condition </div> <div> Memory loss (alzheimer's, dementia) </div> </div>
Receive any of the following care within the last month:	<div> <div> Treatment of a wound or pressure ulcer by a health professional Daily monitoring by a skilled nurse (LPN or RN) Physical Therapy and/or occupational therapy In patient psychiatric care Treatment with IV medication Hospital stay of 3 days or more Treatment for a substance use disorder </div> <div> At home health care </div> </div>
Experience a fall within the last month	No
Are you or the person you are contacting us about currently living in a nursing home and would like assistance leaving the nursing home?	No

HEALTH COVERAGE

Health Insurance Information: Do you or the person you are contacting us about have any of the following types of health coverage? Please check all that apply.*	<div> <div> VA Health Coverage Medicare Private or Employer Insurance HealthSource RI Plan Rhody Health Partners or Rite Care Plan Medicaid All Other Medicaid Application Pending </div> <div> Medicaid LTSS </div> </div>
--	---

FINANCIAL INFORMATION

Do you or the person you are contacting us about receive any of the following?*	<div> <div> Supplemental Security Income (SSI) Veterans Administration (VA) Benefits Other None Retirement, Survivors and Disability Insurance Pension or Retirement Plan </div> <div> Social Security Disability Insurance (SSDI) </div> </div>
Which of the following best describes the income you/the person have on a monthly basis?*	Between \$2,300 - \$4,500 / month
Are you or the person you are contacting us about married? If so, and tell us the combined total resources/assets of both spouses when responding to the question below.	No

Intake & Screening Tool

What are the total financial assets/resources of the consumer (cash, checking, savings, CD, bonds, etc.) ? (IF SINGLE)*	Between \$4,000 - \$10,000 ▼
---	------------------------------

LIVING ARRANGEMENT

Which of the following best describes where you/the person live(s) now?*	Living with Family/Friends ▼
If you/the person reside(s) in a home-like setting (house, apartment, condo, etc.), which of the following best describes who else lives there?	Other relatives/friends ▼

ASSISTANCE WITH DAILY ACTIVITIES

In this section, we would like to know more about the areas of daily life where some type of assistance may be needed by you or the person you are contacting us about.

▲ Hide Text

Do you/the person need help on most days with any of the following: (Check all that apply)

Bathing (e.g., getting in and out of a shower/tub, using faucets, hair/body toweling)	<input type="checkbox"/>
Dressing (e.g., putting on/taking off clothes, socks, shoes, or stockings)	<input type="checkbox"/>
Toileting (e.g., getting on or off the toilet, wiping, or changing pads)	<input type="checkbox"/>
Eating (e.g., eat, drink, using utensils, chewing/swallowing)	<input checked="" type="checkbox"/>
Grooming (e.g., brushing teeth, combing hair, shaving, cutting nails)	<input type="checkbox"/>
Managing Medications (e.g., filling prescriptions, taking pills/medicines as directed, keeping meds organized)	<input type="checkbox"/>
Moving About (e.g., going from room to room or outside and back in without a walker or other assistive device)	<input checked="" type="checkbox"/>
Physical transitions (e.g., getting up from or moving between a bed, a chair/wheelchair, or toilet without help)	<input type="checkbox"/>
Housekeeping (e.g., general cleaning, dusting/vacuuming, washing dishes)	<input type="checkbox"/>
Preparing Meals (e.g., planning, cooking, serving and clean-up)	<input checked="" type="checkbox"/>
Shopping (e.g., grocery, clothes, prescriptions)	<input type="checkbox"/>
Laundry (e.g., using washer/dryer, folding, putting laundry away)	<input type="checkbox"/>
Handling Mail (e.g., opening, reading, responding)	<input type="checkbox"/>
Managing Money (e.g., keeping accounts, paying bills, handling cash)	<input type="checkbox"/>
Assistive Devices	<div> <div> Uses a Cane Rollator Uses a walker Wheel-chair reliant Other Falls or is at risk of falling </div> <div> ▲ ▶ ▶ ▶ ◀ ◀ ◀ </div> <div> Needs assistance moving </div> </div>

Intake and Screening Tool

6. Scroll to the Intake and Screening Response Results Section to review the scoring.

INTAKE & SCREENING RESPONSE RESULTS

PCOC Recommended	<input type="text" value="Yes"/>
------------------	----------------------------------

High Priority

Living Situation	<input type="text" value="No"/>
Youth (IDD or Other Disability) Who is Turning 19 or 21	<input type="text" value="No"/>

Health Status & Cognition

Behavioral Health	<input type="text" value="No"/>
COVID	<input type="text" value="No"/>
Substance Use	<input type="text" value="No"/>
Physical Disability	<input type="text" value="No"/>
Intellectual or Developmental Disability	<input type="text" value="No"/>
Acquired or Traumatic Brain Injury	<input type="text" value="No"/>
Memory Loss	<input type="text" value="Yes"/>

Medicaid LTSS Financial Eligibility

Already Receiving Medicaid LTSS	<input type="text" value="Yes"/>
Eligible or Almost Certainly Eligible	<input type="text" value="No"/>
Might be eligible	<input type="text" value="Yes"/>
Most likely ineligible	<input type="text" value="No"/>

Referrals

Referral to NHTP	<input type="text" value="Yes"/>
Referral to OSCIL	<input type="text" value="No"/>

By checking this box, I hereby authorize the use or disclosure of my protected health information as described above.	<input checked="" type="checkbox"/>
---	-------------------------------------

Intake and Screening Tool > Intake and Screening Response Results

- If **PCOC Recommended** = Yes, scroll back to the top and check **Show Consumer**.
- Select **Save and Close Documentation** from the File menu.



Note:

If the prospective consumer will be referred to PCOC, checking the **Show Consumer** box will copy the documentation to the Consumer record.

- Skip to page 61 to continue with the PCOC Tool.

Call Record and PCOC Process

Call records are available in the Calls Chapter. To access the record:

- Click on the Calls Chapter.



- Select a record from the Call List Grid.

MY WORK CALLS CONSUMERS PROVIDERS REPORTS										
<div> <div>Filters</div> <div> Overall Status <input type="text"/> Equal To <input type="text"/> Open <input type="text"/> AND <input type="text"/> </div> <div> Call ID <input type="text"/> </div> <div> <input type="button" value="Search"/> <input type="button" value="Reset"/> </div> </div>										
4 Queue Search record(s) returned - now viewing 1 through 4										
Call ID	Call Date	Call Time	Call Method	Overall Status	Task Status	Caller Name	Prospective Consumer	Checked Out By		
10192	12/14/2020	8:20 AM	Telephone	Open	Pending PCOC Follow-Up/Close-Out	Vanderbilt, Jason Arthur	Lawson, Laura B	Schmidt, Dustin		
10193	12/21/2020	8:02 AM	Telephone	Open	Pending PCOC Follow-Up/Close-Out	Rodgers, Cecilia L	Harrison, David	Guglielmo, Barbara		
10198	01/08/2021	2:08 PM	Telephone	Open	Pending PCOC Follow-Up/Close-Out	Harrison, David	Miller, James R			
10223	02/15/2021	1:07 PM	Telephone	Open	Pending Initial Call with the Consumer	Sargent, Elizabeth				

Call List Grid page



The last column of the grid, **Checked Out By**, lets you know if another worker has the record checked out. If that is the case, you will be able to open the record to view only.

- The Call Details page will display.

File Tools Reports Word Merge

Call	Call Information
Participants	Division: PCOC
Documentation	Date of Initial Contact *: 06/02/2021
Notes	Time of Initial Contact *: 11:57 AM
Associated Calls	Intake and Screening Worker *: Guglielmo, Barbara
Events	Call Date *: 06/02/2021
Track Call Status	Call Time: 11:57 AM
	Call Method: Other
	Type of PCOC *: Other Referral to DHS
	How did you hear about us?: Internet
	In a crisis situation requiring immediate health care assistance? <input type="checkbox"/>
	Reason for Call
	Details of Call: <div></div>
	Decision
	Overall Status *: Open *
	Task Status *: Pending Initial Call with the Consumer
	Comments: <div></div>
	PCOC Counselor: Guglielmo, Barbara

Call Details page

4. Select **Check Out Call** from the File menu.

File Tools Word Merge

History
 Spell Check
Check Out Call
 Search for Consumer
 Print
 Close Call

File menu

To navigate a call record, there are subpages on the left side of the page.

Call Subpage	Description
Call	This page contains call and decision information.
Participants	This page contains information on the Caller, Consumer and Contacts.
Documentation	This page contains the intake & screening tool and the PCOC tool.
Notes	This page contains notes and attachments.
Associated Calls	This page allows the worker the ability to search and link other call records.
Events	Triggered Workflow Wizards appear, allowing the worker to see all events that have been triggered in the record.
Track Call Status	This page displays the status changes of the Call.

Call Participants

1. Click on Participants subpage.
2. The Participant List page will display.

File Add Participant

Call
Participants
Documentation
Notes
Associated Calls
Referrals
Events
Track Call Status

Filters
Last Name

- 2 Participants record(s) returned - now viewing 1 through 2

Last Name	First Name	Relationship to Prospective Consumer	Contact Type	City	State	Zip Code	Home Phone	Work Phone	Email	Age
Harrison	David		Caller							
Harrison	David		Consumer	Riverside	Rhode Island	02915				

First Previous Records per page: 15 Next Last

Call Participants List page

3. Select the Consumer from the grid.
4. The Participant details page will display.

File Tools Reports

Consumer

Consumer	
Primary	<input checked="" type="checkbox"/>
First Name	<input type="text" value="Rebecca"/>
Middle Initial	<input type="text"/>
Last Name	<input type="text" value="Early"/>
Address Type	<input type="text" value="Unknown"/>
Street	<input type="text" value="123 Schooner"/>
Street 2	<input type="text" value="Apt. 33"/>
City	<input type="text" value="Tiverton"/> <input type="button" value="Clear"/>
State	<input type="text" value="Rhode Island"/> <input type="button" value="Clear"/>
Zip Code	<input type="text" value="02878"/> <input type="button" value="Clear"/>
Home Phone	<input type="text"/>
Work Phone	<input type="text"/>
Work Extension	<input type="text"/>
Mobile Phone	<input type="text" value="(401)278-9955"/>
Email	<input type="text"/>
Race	<input type="text" value="White"/>
Ethnicity	<input type="text" value="Non-Hispanic/Non-Latino"/>
Gender	<input type="text" value="Female"/>
DOB	<input type="text" value="10/24/1952"/>
Age	<input type="text" value="68.7"/>
Caregiver Legal Status	<input type="text" value="Others"/>
Legal Status	<input type="text" value="Unknown"/>
Marital Status	<input type="text" value="Never Married"/>
Languages Spoken	<input type="text" value="English"/>
Interpreter/Translator Needed?	<input type="checkbox"/>
Military Veteran	<input type="text"/>

[Consumer Details page](#)

5. If necessary, add/edit information on the participant.
6. Select **Save and Close Consumer** from the File menu.
7. Follow steps 3-6 to view the Caller or Other Contacts information.

Intake and Screening Tool

10. Click on **Documentation** to open the screening tool.
11. Select **Add Documentation** from the File menu.
12. The Documentation page will display.
13. Select **Intake and Screening Tool** from Please Select Type dropdown list.

Intake & Screening Tool

Call Documentation

Document Date *	07/13/2021
Doc. By *	Guglielmo, Barbara
Doc Name *	Intake & Screening Tool
Status *	Open
Participant	Gerard, Sally (Consumer)
Show Consumer	<input type="checkbox"/>

Start Time	<div>▼</div> <div>▼</div> <div>▼</div>
End Time	<div>▼</div> <div>▼</div> <div>▼</div>

CONSUMER STATUS

Are you or the person you are contacting us about:

A Rhode Island resident who lives in the state more than 1/2 a year?*	Yes
A youth with an intellectual/developmental disability or a serious, chronic and disabling condition who is turning age 19 or 21?*	Yes
Expected to need health care services and supports for a period that is likely to last more than a month?	No
Have any of the following health conditions, illnesses or disabilities caused this need for services and supports:*	<div> <div>A COVID infection and treatment</div> <div>Accident or injury requiring medical treatment</div> <div>A chronic medical condition (e.g. heart disease)</div> <div>An intellectual/developmental disability (occurs)</div> <div>Physical condition or disability affecting mobility</div> <div>Serious and persistent behavioral health condition</div> <div>Memory loss (Alzheimer's, dementia)</div> </div> <div> <div>Substance use disorder (e.g., alcohol, Rx abuse)</div> </div>
Receive any of the following care within the last month:	<div> <div>Treatment of a wound or pressure ulcer by a healthcare provider</div> <div>At home health care</div> <div>Daily monitoring by a skilled nurse (LPN or RN)</div> <div>Physical Therapy and/or occupational therapy</div> <div>In patient psychiatric care</div> <div>Treatment with IV medication</div> <div>Hospital stay of 3 days or more</div> </div>
Experience a fall within the last month	No
Are you or the person you are contacting us about currently living in a nursing home and would like assistance leaving the nursing home?	No

Intake & Screening Tool page

14. Complete the form.



Note

If the field has a red asterisk (*), the field is required and must be populated in order to save the tool.

15. At the bottom of the tool is a section, **Intake & Screening Response Results**.

INTAKE & SCREENING RESPONSE RESULTS

PCOC Recommended	<input type="text" value="No"/>
High Priority	
Crisis Situation	<input type="text" value="No"/>
Living Situation	<input type="text" value="No"/>
Youth (IDD or Other Disability) Who is Turning 19 or 21	<input type="text" value="No"/>
Health Status & Cognition	
Behavioral Health	<input type="text" value="No"/>
COVID	<input type="text" value="No"/>
Substance Use	<input type="text" value="No"/>
Physical Disability	<input type="text" value="No"/>
Intellectual or Developmental Disability	<input type="text" value="No"/>
Acquired or Traumatic Brain Injury	<input type="text" value="No"/>
Memory Loss	<input type="text" value="No"/>
Medicaid LTSS Financial Eligibility	
Already Receiving Medicaid LTSS	<input type="text" value="No"/>
Eligible or Almost Certainly Eligible	<input type="text" value="No"/>
Might be eligible	<input type="text" value="No"/>
Most likely ineligible	<input type="text" value="No"/>
Referrals	
Referral to NHTP	<input type="text" value="No"/>
Referral to OSCIL	<input type="text" value="No"/>
By checking this box, I hereby authorize the use or disclosure of my protected health information as described above. <input type="checkbox"/>	

Intake & Screening Response Results

16. If certain criteria are met, the value of the question will change from No to Yes. This information will help guide how you work with the Consumer.
17. Scroll to the top and select a value for the Status.
18. If **PCOC Recommended** = Yes, check the **Show Consumer** box.
19. Select **Save and Close Documentation** from the File menu.

Practice #3 Exercise



Practice Exercise #3

1. Review the participants records.
2. Complete the Intake & Screening Tool.

PCOC Tool

1. Select **Add Documentation** from the File menu.
2. The Documentation page will display.
3. Select **PCOC Tool** from Please Select Type dropdown list.
4. Select the Consumer for the **Participant field**.

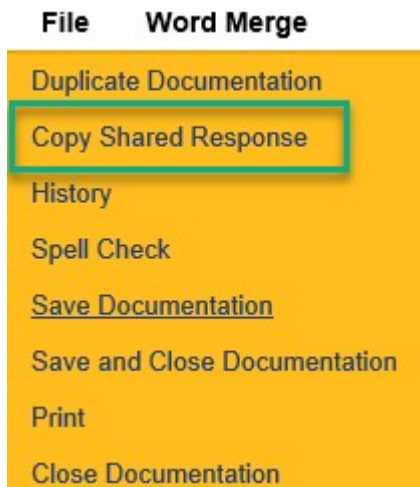
PCOC Tool

Call Documentation

Document Date *	07/13/2021 
Doc. By *	Guglielmo, Barbara
Doc Name *	PCOC Tool
Status *	<div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;">▼*</div>
Participant	<div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;">▼</div>
Show Consumer	<input type="checkbox"/>

[Documentation](#)>[PCOC Tool](#)

5. Select **Copy Shared Response** from File menu.



Select Copy Share Response from File menu

6. Documents with Shared Response window will display. Select the Intake & Screening Tool in the grid.


Human Services

Call ID = 10198 - David Harrison
3/15/2021 7:42 AM

Documents with Shared Responses

File

Filters
Search Reset

—1 Documents with Shared Responses record(s) returned - now viewing 1 through 1—

Document Name	Review	Review Date	Rater	Status
Intake & Screening Tool		01/25/2021	Guglielmo, Barbara	Pending

First Previous Records per page: 15 Next Last

[Document with Shared Responses List Grid](#)

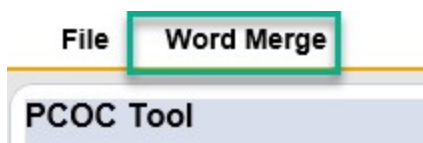
7. The response results from the Intake & Screening Tool will appear at the top of the form.

INTAKE & SCREENING RESPONSE RESULTS

PCOC Recommended	<input type="text" value="No"/>	Link
High Priority		
Crisis Situation	<input type="text" value="No"/>	Link
Living Situation	<input type="text" value="No"/>	Link
Youth (IDD or Other Disability) Who is Turning 19 or 21	<input type="text" value="No"/>	Link
Health Status & Cognition		
Behavioral Health	<input type="text" value="No"/>	Link
COVID	<input type="text" value="No"/>	Link
Substance Use	<input type="text" value="No"/>	Link
Physical Disability	<input type="text" value="No"/>	Link
Intellectual or Developmental Disability	<input type="text" value="No"/>	Link
Acquired or Traumatic Brain Injury	<input type="text" value="No"/>	Link
Memory Loss	<input type="text" value="No"/>	Link
Medicaid LTSS Financial Eligibility		
Already Receiving Medicaid LTSS	<input type="text" value="No"/>	Link
Eligible or Almost Certainly Eligible	<input type="text" value="No"/>	Link
Might be eligible	<input type="text" value="Yes"/>	Link
Most likely ineligible	<input type="text" value="Yes"/>	Link

Intake & Screening Response Results

8. Complete the form.
9. Scroll to the top and enter a value for the Status field.
10. If **PCOC Recommended** = Yes, check the **Show Consumer** box.
11. Select **Save Documentation** from the File menu.
12. The toolbar will now display **Word Merge**. Select **PCOC Action Plan** from the Word Merge menu.



Click Word Merge from toolbar.

13. The Word Merge Editor window will display with the PCOC Action Plan.


File

Preview (read-only)
This is a preview of your merge document and is not editable.

Generate Merge Document
Click the "Open Document" button to open the Merge Document for editing.
[Open Document](#)

Save to Note
If no changes have been made to the Merge Document, click "Save to Note". The current word merge template will be uploaded to a note record with the merge fields populated.
[Save to Note](#)

Upload and Save to Note
If changes were made to the Merge Document, click "Upload and Save to Note" to select the saved file and upload that document to a note record. Don't forget to delete the saved document after you have attached it to the note record.
[Upload and Save to Note](#)



**Executive Office of
HEALTH & HUMAN
SERVICES**
STATE OF MASSACHUSETTS

Your PCOC Action Plan:

Consumer background/preferences: Recently moved into a long term care facility

Goal: Default Goal Number 1 - Goal is to...

Action Steps:
Default Action Step 1a.
Default Action Step 1b.
Default Action Step 1c.
Default Action Step 1d.

Service Options:
Default Service Option 1a.Default Service Option 1b.Default Service Option 1c.

Do you want to save **PCOC Action Plan.docx** (144 KB) from **fwtest.harmonyis.net**? [Save](#) [Cancel](#)

100%

PCOC Action Plan Word Merge Letter

If printing to share with consumer:



14. Click on the print icon and follow prompts to print.

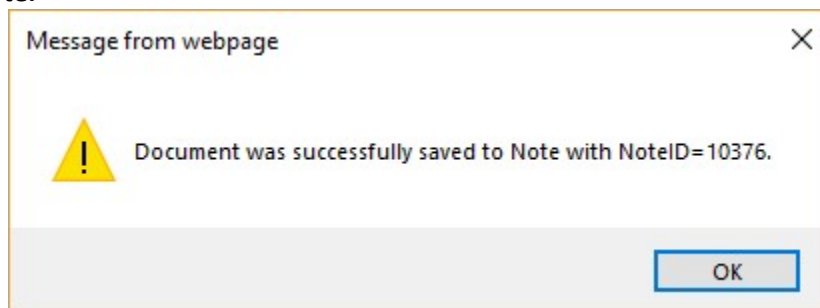
If saving to a note:

Generate Merge Document
Click the "Open Document" button to open the Merge Document for editing.
[Open Document](#)

Save to Note
If no changes have been made to the Merge Document, click "Save to Note". The current word merge template will be uploaded to a note record with the merge fields populated.
[Save to Note](#)

Upload and Save to Note
If changes were made to the Merge Document, click "Upload and Save to Note" to select the saved file and upload that document to a note record. Don't forget to delete the saved document after you have attached it to the note record.
[Upload and Save to Note](#)

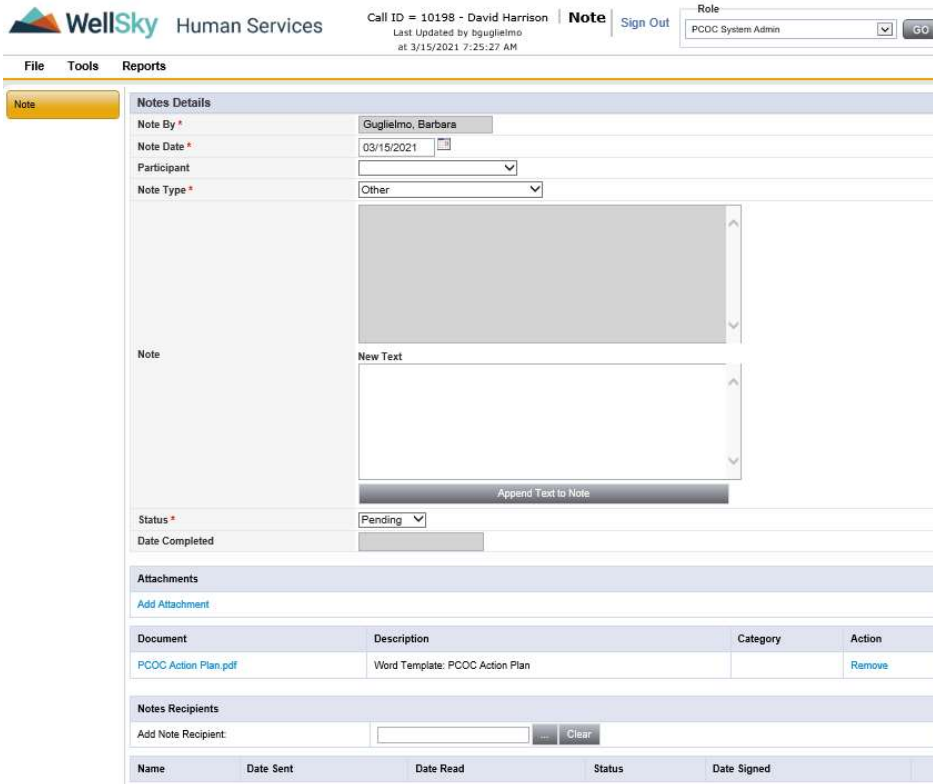
15. Click on **Save to Note**.



Message was successfully saved to Note.

16. Click **OK**.

17. The Notes Details page will display.



WellSky Human Services Call ID = 10198 - David Harrison | **Note** | Sign Out | Role: PCOC System Admin

Last Updated by bguglielmo at 3/15/2021 7:25:27 AM

Note

Notes Details

Note By * Guglielmo, Barbara

Note Date * 03/15/2021

Participant *

Note Type * Other

Note

New Text

Append Text to Note

Status * Pending

Date Completed

Attachments

Add Attachment

Document	Description	Category	Action
PCOC Action Plan.pdf	Word Template: PCOC Action Plan		Remove

Notes Recipients

Add Note Recipient: Clear

Name	Date Sent	Date Read	Status	Date Signed
------	-----------	-----------	--------	-------------

Note Details Page

18. The Note By and Note Date fields will be pre-populated with User's name and Note creation Date.
19. Select the Consumer for the Participant field.
20. Change the Note Type from Other to **PCOC Action Plan**.
21. Enter Note details in the Note textbox. Click **Append Text to Note**. The note will transfer to the greyed-out text box.
22. Under the Document sub-header, you will see the attached document.
23. Change Status from Pending to **Complete**.
24. Select **Save and Close Note** from the File menu.
25. You will be returned to the PCOC Tool form.
26. Select **Save and Close Documentation** from the File menu.

Practice Exercise #4



Practice Exercise #4

1. Complete the PCOC Tool.


PCOC Referral Form

1. Click on the Calls Subpage.

File	Tools	Word Merge
Call	1. Unable to Reach Start Session (Send Brochure)	
Participants	2. Letter Sent After PCOC (send PCOC Action Plan)	1/08/2021
Documentation	3. Unable to Reach for Follow-up (send PCOC Action Plan)	2:08 PM
Notes	4. Close Out (send PCOC Action Plan)	uglielmo, Barbara
Associated Calls	PCOC Referral Form	1/08/2021
Referrals	Call Time	02:08 PM
Events	Call Method	Telephone
	Call Type *	Information
	How did you hear about us?	Community Outreach Worker

Select PCOC Referral Form from the Word Merge menu.

2. Select PCOC Referral Form from the Word Merge menu.


WellSky Human Services

Call ID = 10198 - David Harrison
3/23/2021 12:05 PM

PCOC Referral Form

File

Preview (read-only)
This is a preview of your merge document and is not editable.

Generate Merge Document
Click the "Open Document" button to open the Merge Document for editing.
Open Document

Save to Note
If no changes have been made to the Merge Document, click "Save to Note". The current word merge template will be uploaded to a note record with the merge fields populated.
Save to Note

Upload and Save to Note
If changes were made to the Merge Document, click "Upload and Save to Note" to select the saved file and upload that document to a note record. Don't forget to delete the saved document after you have attached it to the note record.
Upload and Save to Note

DHS Referral Form

This form is used to refer clients to Independent Provider (IP), Personal Choice, Shared Living, Office of Healthy Aging, Medicaid Preventive (RIPIN) and other interagency and community programs.

Section I: Referral Information

Today's Date: Click here to enter text.

Name of Referrer (LTSS SCW): Click here to enter text. Phone #: Click here to enter text.

Referral to:

☐ Office of Healthy Aging

☐ Independent Provider

☐ Shared Living

☐ Personal Choice

☐ Medicaid Preventive (RIPIN)

☐ Other: Click to Specify

Section II: Client Information

Please check all that apply

☐ Client was found Eligible for Preliminary review and is pending Full eligibility Screening

Do you want to save PCOC Referral Form.docx (172 KB) from fwtest.harmonyis.net?

Save **Cancel**

PCOC Referral Form

If printing to share with consumer:



3. Click on the print icon and follow prompts to print.

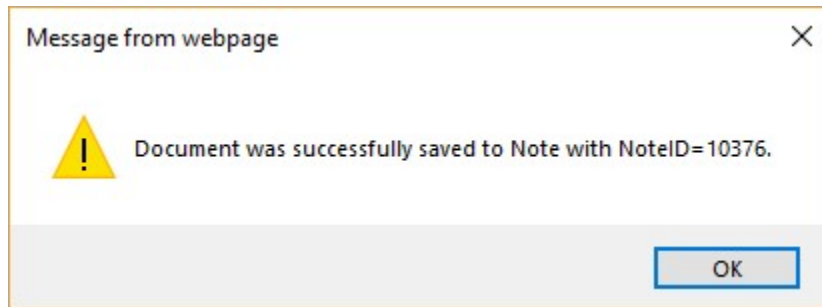
If saving to a note:

Generate Merge Document
Click the "Open Document" button to open the Merge Document for editing.
Open Document

Save to Note
If no changes have been made to the Merge Document, click "Save to Note". The current word merge template will be uploaded to a note record with the merge fields populated.
Save to Note

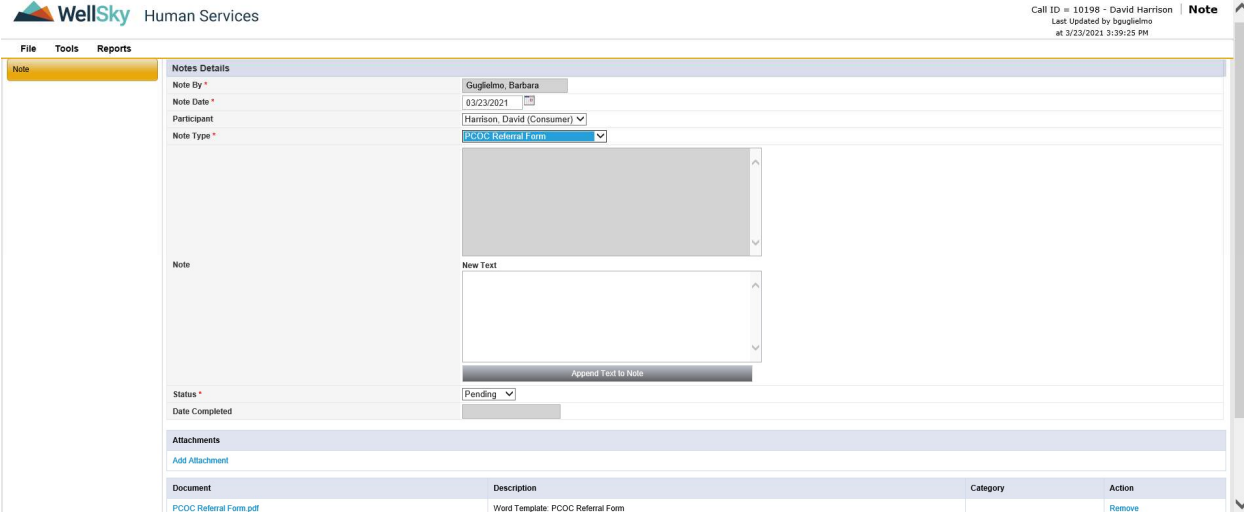
Upload and Save to Note
If changes were made to the Merge Document, click "Upload and Save to Note" to select the saved file and upload that document to a note record. Don't forget to delete the saved document after you have attached it to the note record.
Upload and Save to Note

4. Click on **Save to Note**.



Message was successfully saved to Note.

5. Click **OK**.
6. The Notes Details page will display.



Note Details Page

7. The Note By and Note Date fields will be pre-populated with User's name and Note creation Date.
8. Select the Consumer for the Participant field.
9. Change the Note Type from Other to **PCOC Referral Form**.
10. Enter Note details in the Note textbox. Click **Append Text to Note**. The note will transfer to the greyed-out text box.
11. Under the Document sub-header, you will see the attached document.
12. Change Status from Pending to **Complete**.
13. Select **Save and Close Note** from the File menu.
14. You will be returned to the PCOC Tool form.
15. Select **Save and Close Documentation** from the File menu.

Word Merge Documents


During the PCOC process, counselors may correspond with consumers using letters.

1. Return to the Call details page.
2. Select a letter from the Word Merge menu.

File	Tools	Reports	Word Merge
Call			1. Unable to Reach Start Session (Send Brochure)
Participants			1. Unable to Reach Start Session (Send Brochure) - Portuguese
Documentation			1. Unable to Reach Start Session (Send Brochure) - Spanish
Notes			2. Letter Sent After PCOC (send PCOC Action Plan)
Associated Calls			2. Letter Sent After PCOC (send PCOC Action Plan) - Portuguese
Events			2. Letter Sent After PCOC (send PCOC Action Plan) - Spanish
Track Call Status			3. Unable to Reach for Follow-up (send PCOC Action Plan)
			3. Unable to Reach for Follow-up (send PCOC Action Plan) - Portuguese
			3. Unable to Reach for Follow-up (send PCOC Action Plan) - Spanish
			4. Close Out (send PCOC Action Plan)

Word Merge file options

- The Word Merge Editor window will open with the chosen letter displayed.


Human Services

Call ID = 10239 - William Brower
4/6/2021 4:16 PM

1. Unable to Reach Start Session (Send Brochure)

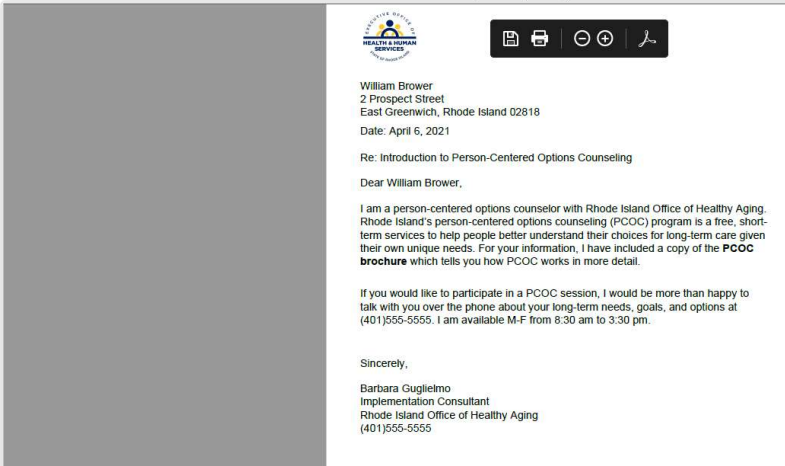
File

Generate Merge Document
Click the "Open Document" button to open the Merge Document for editing.

Save to Note
If no changes have been made to the Merge Document, click "Save to Note". The current word merge template will be uploaded to a note record with the merge fields populated.

Upload and Save to Note
If changes were made to the Merge Document, click "Upload and Save to Note" to select the saved file and upload that document to a note record. Don't forget to delete the saved document after you have attached it to the note record.

Preview (read-only)
This is a preview of your merge document and is not editable.



Do you want to save 1. Unable to Reach to Start Session (Send Brochure).docx (145 KB) from hwtest.harmony.net?

Save Cancel

Word Merge Editor window

If printing to share with consumer:



Word Merge Toolbar

- Click on the print icon and follow prompts to print.

If saving to a note:

Generate Merge Document

Click the "Open Document" button to open the Merge Document for editing.

[Open Document](#)

Save to Note

If no changes have been made to the Merge Document, click "Save to Note". The current word merge template will be uploaded to a note record with the merge fields populated.

[Save to Note](#)

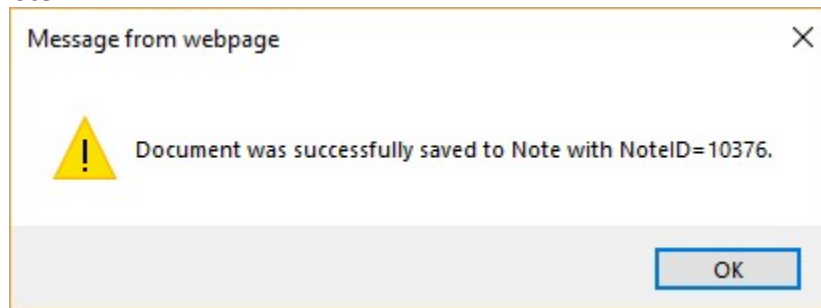
Upload and Save to Note

If changes were made to the Merge Document, click "Upload and Save to Note" to select the saved file and upload that document to a note record. Don't forget to delete the saved document after you have attached it to the note record.

[Upload and Save to Note](#)

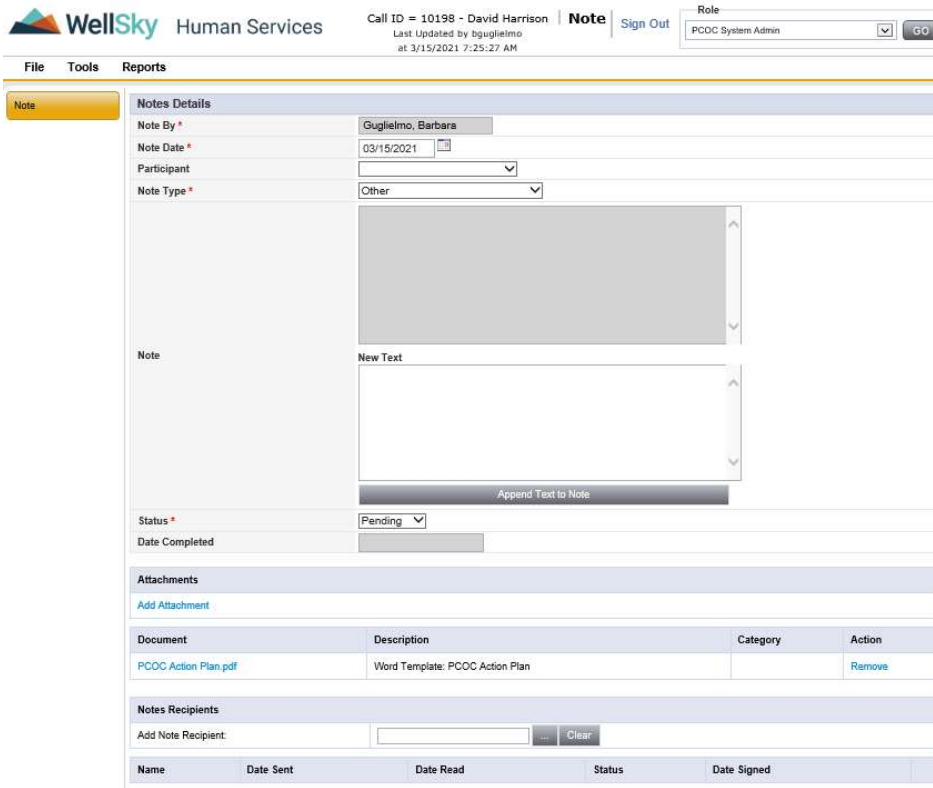
Word Merge options

- Click on **Save to Note**.



Message was successfully saved to Note.

- Click **OK**.
- The Notes Details page will display.



WellSky Human Services | Call ID = 10198 - David Harrison | **Note** | Sign Out | Role: PCOC System Admin

Last Updated by bguilelmo at 3/15/2021 7:25:27 AM

File Tools Reports

Note

Notes Details

Note By *

Note Date *

Participant

Note Type *

Note

New Text

Append Text to Note

Status *

Date Completed

Attachments

[Add Attachment](#)

Document	Description	Category	Action
PCOC Action Plan.pdf	Word Template: PCOC Action Plan		Remove

Notes Recipients

Add Note Recipient:

Name	Date Sent	Date Read	Status	Date Signed
------	-----------	-----------	--------	-------------

Note Details Page

5. The Note By and Note Date fields will be pre-populated with User's name and Note creation Date.
6. Select the Consumer for the Participant field.
7. Change the Note Type from Other to the type of letter attached.
8. Enter Note details in the Note textbox. Click **Append Text to Note**. The note will transfer to the greyed-out text box.
9. Under the Document sub-header, you will see the attached document.
10. Change Status from Pending to **Complete**.
11. Select **Save and Close Note** from the File menu.

Practice Exercise #5



Practice Exercise #5

1. Execute a Word Merge Letter.
2. Add a Referral.

Decision & Check in Call

This section is used to document where in the process a counselor and consumer are in the workflow.

If uninterested or unavailable:

1. Click on the Calls details page.
2. Under the Decision section, change the Overall Status to equal **Complete**.
3. Change Task Status to equal **Closed**.
4. Select the activities completed for **What activities did you complete?**, if applicable.
5. Enter notes in the Comments field, if applicable.
6. Select a value(s) for Resolution.
7. Select **Save, Check in and Close Call** from File menu.

If Information & Referral:

1. Click on the Calls details page.
2. Under the Decision section, change the Overall Status to equal **Complete**.
3. Change Task Status to equal **Closed**.
4. For **What activities did you complete?**, select Information and Referral.
5. Enter notes in the Comments field, if applicable.
6. Select a value(s) for Resolution.
7. Select **Save, Check in and Close Call** from File menu.

If Application Assistance:

1. Click on the Calls details page.
2. Under the Decision section, change the Overall Status to equal **Complete**.
3. Change Task Status to equal **Closed**.
4. For **What activities did you complete?**, select Application Assistance.
5. Enter notes in the Comments field, if applicable.

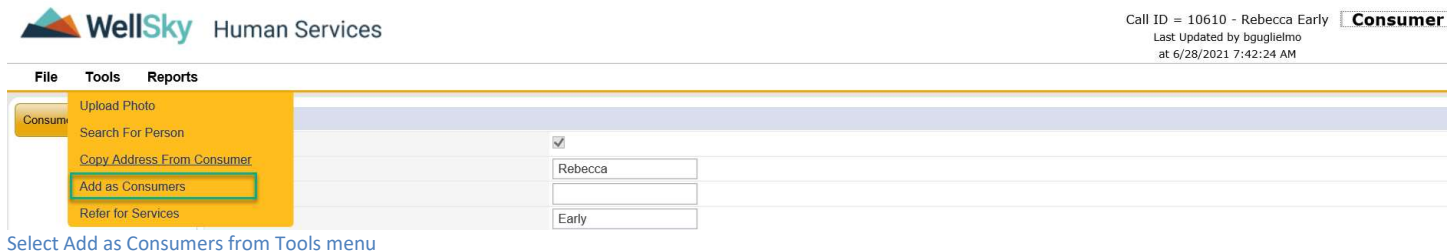
6. Select a value(s) for Resolution.
7. Select **Save, Check in and Close Call** from File menu.

If Opt Out:

8. Click on the Calls details page.
9. Under the Decision section, change the Overall Status to equal Complete.
10. Change Task Status to equal **Closed**.
11. Select the activities completed for **What activities did you complete?**, if applicable.
12. Enter notes in the Comments field, if applicable.
13. **Select Opt Out** for Resolution.
14. Select **Save, Check in and Close Call** from File menu.

If PCOC referral:

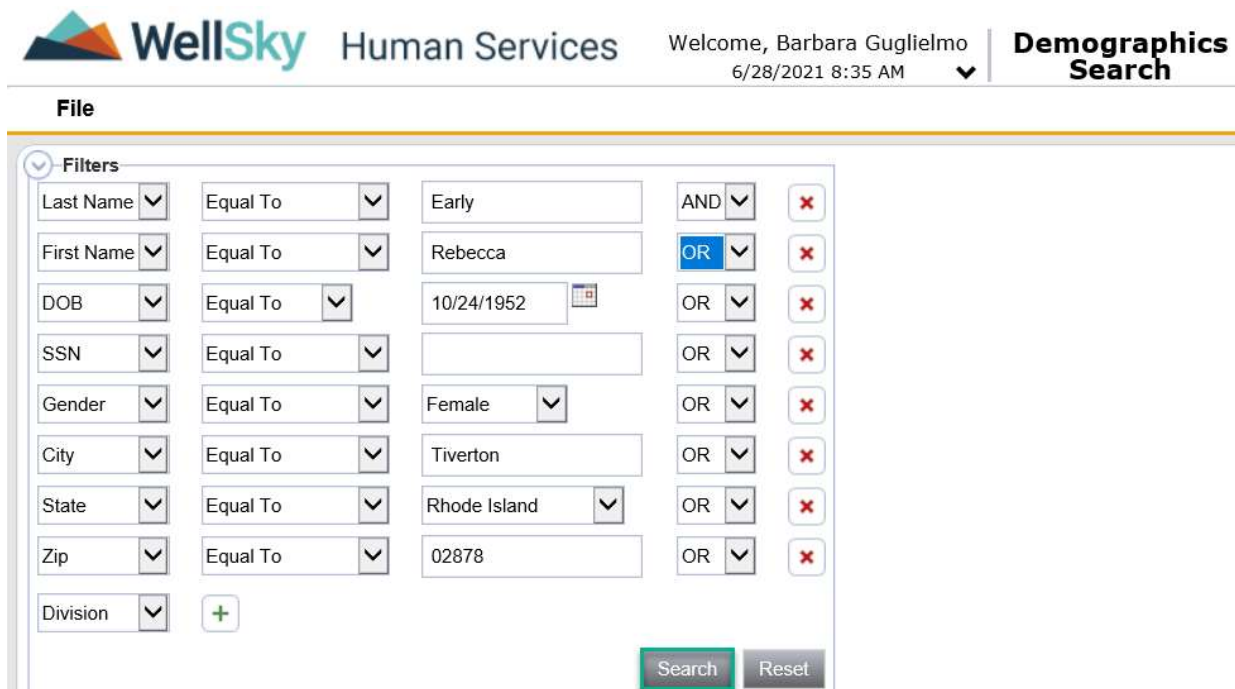
1. Click on the Participants subpage.
2. Click on the Consumer record from the list view grid.
3. Select **Add as Consumers** from Tools menu.



The screenshot shows the WellSky Human Services interface. In the top right corner, it displays 'Call ID = 10610 - Rebecca Early' and 'Consumer'. Below this, it says 'Last Updated by bguglielmo at 6/28/2021 7:42:24 AM'. The main menu includes 'File', 'Tools', and 'Reports'. The 'Tools' menu is open, showing options like 'Upload Photo', 'Search For Person', 'Copy Address From Consumer', 'Add as Consumers' (highlighted with a green box), and 'Refer for Services'. On the right, there is a form with fields for 'Rebecca' and 'Early'.

Select Add as Consumers from Tools menu

4. The Consumer Demographics Search window will display.
5. Criteria from the Consumer record will populate the search criteria.



The screenshot shows the WellSky Human Services interface with the 'Demographics Search' window open. The window title is 'Demographics Search'. It features a 'Filters' section with various search criteria: Last Name, First Name, DOB, SSN, Gender, City, State, Zip, and Division. Each criterion has a dropdown menu for the operator (e.g., 'Equal To') and a text input field for the value. The values are: Last Name (Early), First Name (Rebecca), DOB (10/24/1952), Gender (Female), City (Tiverton), State (Rhode Island), Zip (02878). The 'AND/OR' logic is set to 'OR'. There are 'Search' and 'Reset' buttons at the bottom right.

Demographics Search Page

6. Click Search. If no matches return, click **Add New**.

File

Filters

Last Name	Equal To	Early	AND	X
First Name	Equal To	Rebecca	AND	X
DOB	Equal To	10/24/1952	AND	X
Gender	Equal To	Female	AND	X
City	Equal To	Tiverton	AND	X
State	Equal To	Rhode Island	AND	X
Zip	Equal To	02878	AND	X
Division	+			

0 record(s) returned

Demographics Search Page

7. The Demographics details page displays.

File Tools

Basic Demographics

Initial Division *	<input type="text"/>
Salutation	<input type="text"/>
Last Name *	Early
First Name *	Rebecca
Middle Name	<input type="text"/>
Age	<input type="text"/>
Gender Identity *	Female
Race	White
Ethnicity	Non-Hispanic/Non-Latino
Consumer Photo	<input type="text"/>
DOB *	10/24/1952
Marital Status *	Never Married
Physical Residence	<input type="text"/>
Referral Source	<input type="text"/>
SSN	<input type="text"/>
Medicaid ID	<input type="text"/>
Bridges Case #	<input type="text"/>
Confidential	<input type="checkbox"/>

Contact Information

Address Type	<input type="text"/>
Street	123 Schooner
Street 2	Apt. 33
City	Tiverton
State	Rhode Island
Zip Code	02878
Main Phone - Physical Residence	<input type="text"/>
Main Phone - Authorized Rep	<input type="text"/>
Extension	<input type="text"/>
Cell Phone	(401)278-9955
Fax	<input type="text"/>
Email	<input type="text"/>
Region	<input type="text"/>
Preferred Method of Communication	<input type="text"/>

Descriptive Factors

Primary Language	English
Secondary Language	<input type="text"/>
Birth Place	<input type="text"/>
Birth Certificate	<input type="text"/>
Citizenship	<input type="text"/>
Non-Citizen Immigration Status	<input type="text"/>
INS #	<input type="text"/>
Interpreter/Translator Needed	<input type="checkbox"/>
Medicaid Characteristic	<input type="text"/>
Current Federal Benefits	<input type="text"/>
Current State Benefits	<input type="text"/>

Additional Information

Medical Documentation	<input type="text"/>
LTSS Population	<input type="text"/>
Medicaid MCO	<input type="checkbox"/>

[Consumer Demographics Details Page](#)

8. Complete the fields on the page.
9. Select **Save and Close Demographics** from File menu.
10. The OpenClose details page displays.

File Word Merge

OpenClose

Events

Track Disposition

Division *	PCOC		
Status *	Pending Initial PCOC Session ▼		
Status Date	07/06/2021		
Referral Date	07/06/2021		
Primary Worker *	Kranovich, Dan	...	Clear Details
Secondary Worker		...	Clear

[OpenClose Details Page](#)

11. Change the Status to **Pending Initial PCOC Session**.
12. Select **Save and Close OpenClose** from File menu.
13. Click on **View Consumer Calls**.

Jason Vanderbilt
Last Updated by dkranovich
at 7/6/2021 9:52:02 AM

Demographics [Sign Out](#)
File Edit Tools Ticklers View Consumer Calls
☐ Participating

MY WORK CALLS **CONSUMERS** PROVIDERS REPORTS

Vanderbilt, Jason Arthur (10001)

Demographics OpenClose PCOC Counselor Plans & Assessments Notes

[Click on View Consumer Calls](#)

14. Select the call record from the list view grid.

Call Date	Call ID	Call Method	How did you hear about us?	Intake and Screening Worker	Resolution	Resolution Date	Resolution Time	Task Status	Type of PCOC	Call Time	Checked Out By	Caller	Overall Status
08/30/2021	10623	Telephone	Internet	Kranovich, Dan				Reached Consumer, Scheduled Call to Discuss Options	Intake/Screening	9:53 AM			Open

[Consumer Calls List Page](#)

15. Under the Decision Section, change the Overall Status to equal **Complete**.

16. Change Task Status to equal **Closed**.
17. Enter the completed activities for **What activities did you complete?**
18. Enter notes in the Comments field, if applicable.
19. Select **PCOC Referral** for Resolution.
20. Select **Save, Check in and Close Call** from File menu.
21. Select **Close Consumer Calls** from File menu.


Human Services
7/5/2021 6:21 AM
Consumer Calls

File

Print

Close Consumer Calls

Search

Reset

1 Consumer Calls record(s) returned - now viewing 1 through 1

Call Date	Call ID	Call Method	How did you hear about us?	Intake and Screening Worker	Resolution	Resolution Date	Resolution Time	Task Status	Type of PCOC	Call Time	Checked Out By	Caller	Overall Status
06/30/2021	10623	Telephone	Internet	Kranovich, Dan				Reached Consumer, Scheduled Call to Discuss Options	Intake/Screening	9:53 AM			Open

First

Previous

Records per page: 10

Next

Last

Consumer Calls List Page



Note

*If a consumer comes back (e.g., changes mind), please review **Unlocking a Call Record**, page 77.*

Practice Exercise #6



Practice Exercise #6

1. Update the Decision section of a Call record.

Practice Quiz



Quiz #1

1. True or False: My Work Chapter is where you add a Call record.
2. What role is used to Add a record?
3. True or False: Marital Status of Consumer is recorded on the PCOC Tool.
4. What page would you navigate to execute a Word Merge letter?
5. Where would you find the Intake & Screening Tool?
6. What is a People Search?
7. What is My Work?
8. What is the Task Status when a Consumer does not want to engage in PCOC?

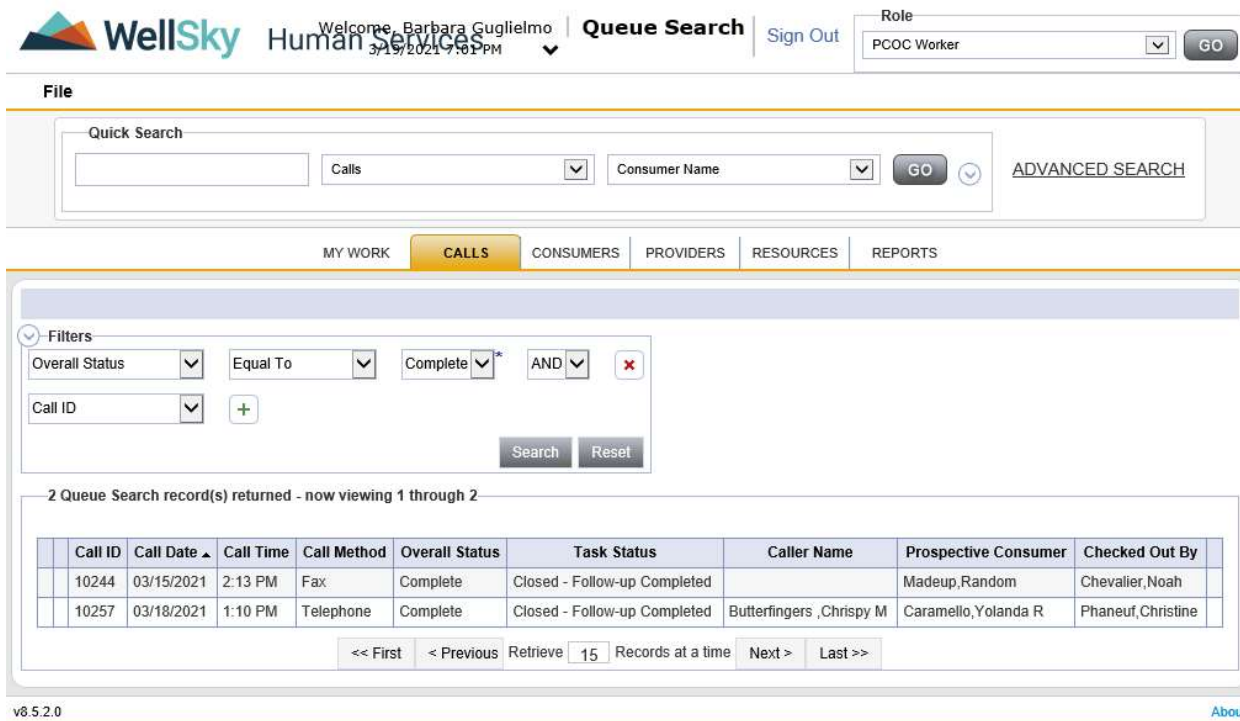
Unlocking a Call Record

There may be circumstances where a counselor will need to unlock a call record (Prospective Consumer opt out/changed mind, Counselor able to contact Prospective Consumer, etc.)

1. Click on the Calls Chapter.



2. Select a record from the Call List Grid.



The screenshot displays the 'Queue Search' interface in the WellSky application. At the top, there is a welcome message for Barbara Guglielmo and a 'Sign Out' button. Below this is a search bar with a 'Quick Search' section containing a text input, a dropdown menu set to 'Calls', and another dropdown menu set to 'Consumer Name'. A 'GO' button and a link to 'ADVANCED SEARCH' are also present. Below the search bar is a navigation bar with tabs for 'MY WORK', 'CALLS' (selected), 'CONSUMERS', 'PROVIDERS', 'RESOURCES', and 'REPORTS'. The main content area shows a 'Filters' section with dropdowns for 'Overall Status' (set to 'Equal To'), 'Complete', and 'AND'. Below this is a 'Call ID' dropdown and a '+' button. A 'Search' button and a 'Reset' button are also visible. The search results section shows '2 Queue Search record(s) returned - now viewing 1 through 2'. A table displays the following data:

Call ID	Call Date	Call Time	Call Method	Overall Status	Task Status	Caller Name	Prospective Consumer	Checked Out By
10244	03/15/2021	2:13 PM	Fax	Complete	Closed - Follow-up Completed		Madeup,Random	Chevalier, Noah
10257	03/18/2021	1:10 PM	Telephone	Complete	Closed - Follow-up Completed	Butterfingers ,Chrispy M	Caramello,Yolanda R	Phaneuf,Christine

At the bottom of the table, there is a pagination control showing '<< First', '< Previous', 'Retrieve 15 Records at a time', 'Next >', and 'Last >>'.

3. The Call Details page will display.

File	Tools	Reports	Word Merge
Call	Call Information		
Participants	Division: PCOC		
Documentation	Date of Initial Contact *: 06/28/2021		
Notes	Time of Initial Contact *: 10:04 AM		
Associated Calls	Intake and Screening Worker *: Guglielmo, Barbara		
Events	Call Date *: 06/28/2021		
Track Call Status	Call Time: 10:04 AM		
	Call Method: Telephone		
	Type of PCOC *: Incoming Call to The Point		
	How did you hear about us?: Hospital Referral		
	In a crisis situation requiring immediate health care assistance? <input checked="" type="checkbox"/>		
	Reason for Call		
	Details of Call		
	Decision		
	Overall Status *: Complete *		
	Task Status *: Closed - Intake and Screening		
	What activities did you complete?		
	<div> Application Assistance Information and Referral Initial PCOC Intake and Screening Other </div>		
	Comments		
	Resolution		
	<div> Client Withdrew Medicaid Application Consumer Applied in Error Consumer Declined PCOC HCBS Referral - DHS Community HCBS Referral - NHTP HCBS Referral - OHA Community HCBS Referral - OSCIL </div>		
	PCOC Referral		
	PCOC Counselor: Guglielmo, Barbara		
	Resolution Date: 06/28/2021		

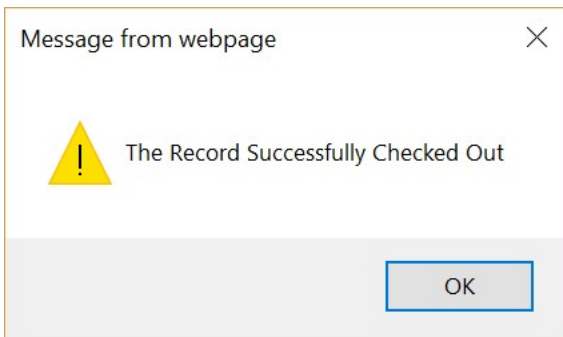
Call Details Page

4. Select **Check Out Call** from the File menu.

File	Tools	Word Merge
History		
Spell Check		
Check Out Call		
Search for Consumer		
Print		
Close Call		


Select Check Out Call from File menu

- A message will display. Click **OK**.



Message from webpage

- Select **Reverse Disposition** from the File menu.



WellSky Human Services

Call ID = 10612 - Sally Gerard
 Last Updated by bguglielmo
 at 7/8/2021 1:10:24 PM

Call

File

Tools

Reports

Word Merge

Call

Participants

Documentation

Notes

Associated Calls

Events

Track Call Status

Call Information

Division	PCOC ▼
Date of Initial Contact *	08/28/2021
Time of Initial Contact *	10:04 AM
Intake and Screening Worker *	Guglielmo, Barbara ▼
Call Date *	08/28/2021
Call Time	10:04 AM
Call Method	Telephone ▼
Type of PCOC *	Incoming Call to The Point ▼
How did you hear about us?	Hospital Referral ▼
In a crisis situation requiring immediate health care assistance?	<input checked="" type="checkbox"/>

Reason for Call

Decision

Overall Status * Pending ▼*

Task Status * Closed - Intake and Screening ▼

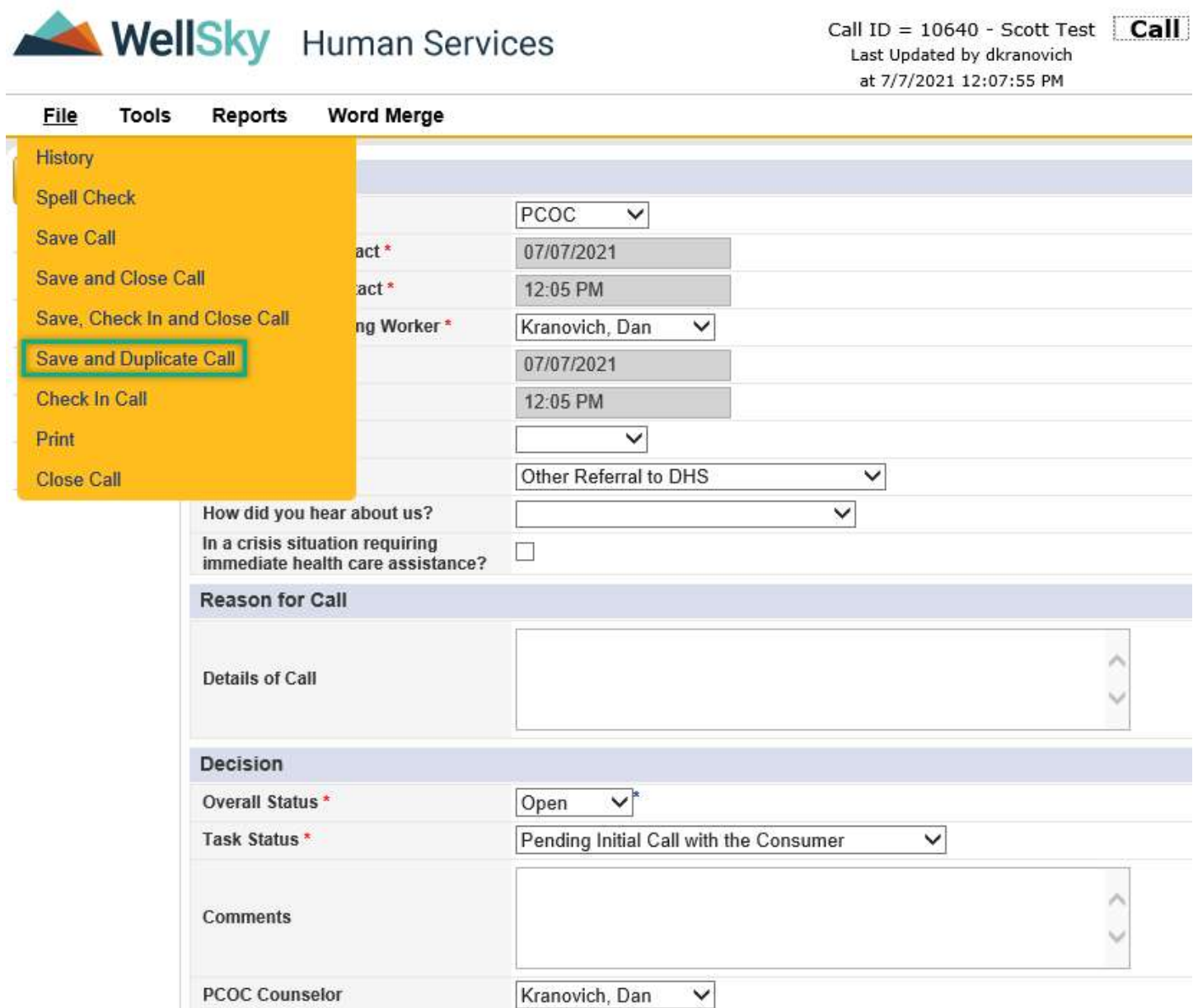
PCOC Counselor Guglielmo, Barbara ▼

Call Details Page

- The record is now editable. You are now able to document your work with the Prospective Consumer.

Associating Call Records

1. From the Call Details page, select **Save and Duplicate Call** from the File menu.



Call ID = 10640 - Scott Test **Call**
Last Updated by dkranovich
at 7/7/2021 12:07:55 PM

File Tools Reports Word Merge

History
Spell Check
Save Call
Save and Close Call
Save, Check In and Close Call
Save and Duplicate Call
Check In Call
Print
Close Call

PCOC ▼

act * 07/07/2021

act * 12:05 PM

ng Worker * Kranovich, Dan ▼

07/07/2021

12:05 PM

▼

Other Referral to DHS ▼

How did you hear about us? ▼

In a crisis situation requiring immediate health care assistance? ☐

Reason for Call

Details of Call

Decision

Overall Status * Open ▼*

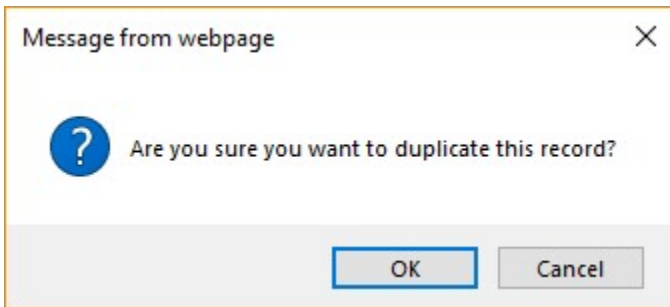
Task Status * Pending Initial Call with the Consumer ▼

Comments

PCOC Counselor Kranovich, Dan ▼

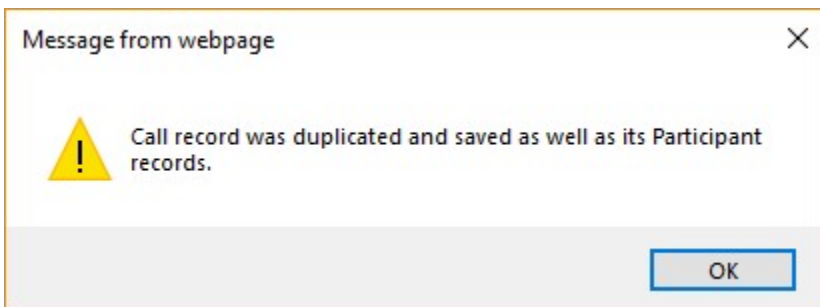
Call Details Page

2. A message will display. Click **OK**.



Message Dialog Box

3. Another message will display. Click **OK**.



Message Dialog Box

4. The new Call record displays.

File Tools Reports Word Merge

Call

Participants

Documentation

Notes

Associated Calls

Events

Track Call Status

Call Information

Division

Date of Initial Contact *

Time of Initial Contact *

Intake and Screening Worker *

Call Date *

Call Time

Call Method

Type of PCOC *

How did you hear about us?

In a crisis situation requiring immediate health care assistance? ☐

Reason for Call

Details of Call

Decision

Overall Status *

Task Status *

Comments

PCOC Counselor

[Call Details page](#)

5. Click on the Participants Subpage.
6. The Prospective Consumer from the original call record is set to a Contact as seen below on the Participant List page.

File Add Participant

Call

Participants

Documentation
Notes
Associated Calls
Referrals
Events
Track Call Status

Filters

Last Name

▼

+

Search Reset

2 Participants record(s) returned - now viewing 1 through 2

Last Name	First Name	Relationship to Prosecutive Consumer	Contact Type	City	State	Zip Code	Home Phone	Work Phone	Email
Sargent	Thelma		Contact	Providence	Rhode Island	02901			
Sargent	Denise		Caller	Providence	Rhode Island	02901			

First Previous Records per page 15 Next Last

Call Participant List page

- Select **Consumer Participant** from the Add Participant menu.

Add Participant

Consumer Participant

Contacts Participant

Add Participant File menu

- The Consumer Details page will display.

File	Tools
<div> <div>Upload Photo</div> <div>Search For Person</div> </div>	
Consumer	
Primary	
First Name	<input type="text"/>
Middle Initial	<input type="text"/>
Last Name	<input type="text"/>
Address Type	<input type="text"/>
Street	<input type="text"/>
Street 2	<input type="text"/>
City	<input type="text"/> <input type="button" value="Clear"/>
State	<input type="text"/> <input type="button" value="Clear"/>
Zip Code	<input type="text"/> <input type="button" value="Clear"/>
Home Phone	<input type="text"/>
Work Phone	<input type="text"/>
Work Extension	<input type="text"/>
Mobile Phone	<input type="text"/>
Email	<input type="text"/>
Race	<input type="text"/>
Ethnicity	<input type="text"/>
Gender	<input type="text"/>
DOB	<input type="text"/>
Age	<input type="text"/>
Caregiver Legal Status	<input type="text"/>
Legal Status	<input type="text"/>
Marital Status	<input type="text"/>
Languages Spoken	<input type="text"/>
Interpreter/Translator Needed?	<input type="checkbox"/>
Military Veteran	<input type="text"/>
Relationship to Consumer	<input type="text" value="Self"/>
Case No	<input type="text"/>

[Prospective Consumer Details page](#)

9. Select **Search for Person** from the Tools menu.
10. The People Search window will display.
11. Search for the person (Refer to page 21).
12. Complete the information on the Prospective Consumer details page.

File Tools Reports

History


Spell Check

Save Consumer

Save and Close Consumer

Print

Close Consumer

<input checked="" type="checkbox"/>	Rebecca
	Early
	Unknown ▼
Street	123 Schooner
Street 2	Apt. 33
City	Tiverton ▼ Clear
State	Rhode Island ▼ Clear
Zip Code	02878 ▼ Clear
Home Phone	
Work Phone	
Work Extension	
Mobile Phone	(401)278-9955
Email	
Race	White ▼
Ethnicity	Non-Hispanic/Non-Latino ▼
Gender	Female ▼
DOB	10/24/1952 
Age	68.7
Caregiver Legal Status	Others ▼
Legal Status	Unknown ▼
Marital Status	Never Married ▼
Languages Spoken	English ▼
Interpreter/Translator Needed?	<input type="checkbox"/>
Military Veteran	▼

Prospective Consumer Details page

13. Select **Save and Close Consumer** from the File menu.
14. Click on the **Associated Calls** subpage.
15. The list page will show the original Call record.

File Tools

Call

Participants

Documentation

Notes

Associated Calls

Referrals

Events

Track Call Status

Filters

Search

Reset

1 Associated Calls record(s) returned - now viewing 1 through 1

	Call ID	Call Date	Call Time	Type of PCOC	Overall Status	Duplicate
	10345	04/06/2021	4:27 PM	Incoming Call to The Point	Open	Yes

First

Previous

Records per page

15

Next

Last

Associated Calls List page

Practice Exercise #7



Practice Exercise #7

1. Update the Decision section of a Call record.

Practice Quiz



Quiz #6

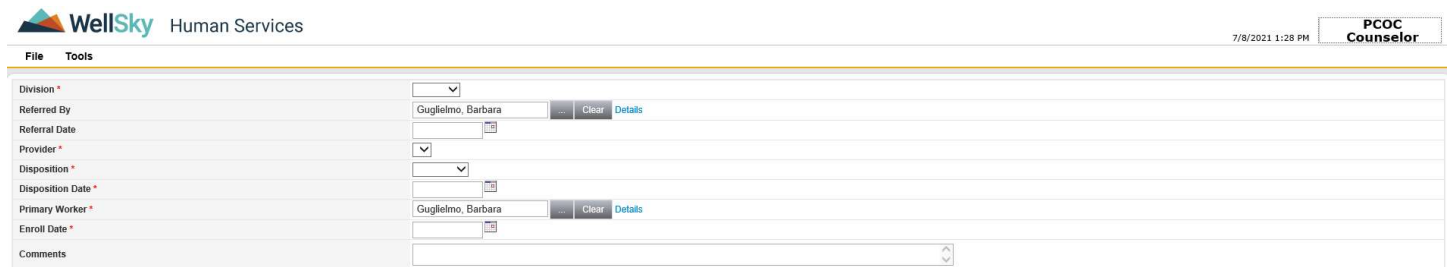
1. True or False: My Work Chapter is where you add a Call record.
2. What role is used to Add a record?
3. True or False: Marital Status of Consumer is recorded on the PCOC Tool.
4. What page would you navigate to execute a Word Merge letter?
5. Where would you find the Intake & Screening Tool?
6. What is a People Search?
7. What is My Work?
8. What is the Task Status when a Consumer does not want to engage in PCOC?

PCOC Workflow – from a Call record

1. Click on the Consumers Chapter.
2. Search and select the consumer from the list view grid.

PCOC Counselor Tab

3. The Consumer Demographics list page displays.
4. Click on the PCOC Counselor tab.
5. Select **Add PCOC Counselor** from the File menu.
6. The PCOC Counselor details page displays.



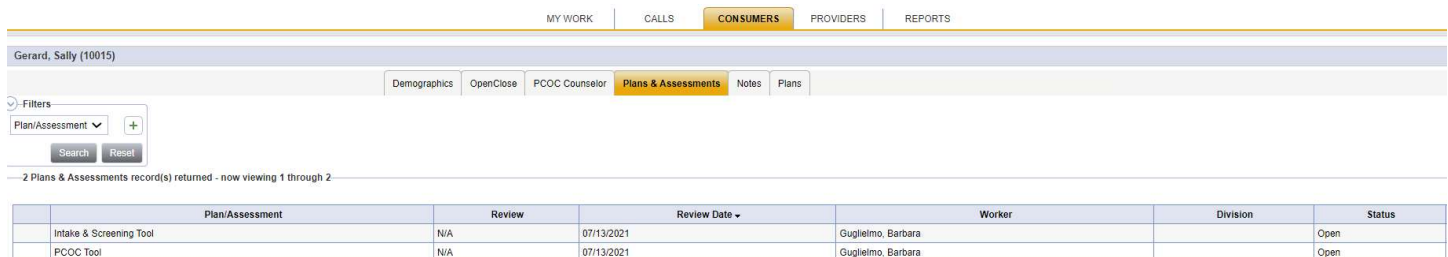
PCOC Counselor Details Page

- a. **Division:** Select PCOC.
 - b. **Referred By:** Displays the worker who created the consumer record.
 - c. **Referral Date:** Enter date referral was made.
 - d. **Provider:** Select from the dropdown list.
 - e. **Disposition:** Select **Open** from the dropdown list.
 - f. **Primary Worker:** Defaults to the worker creating the PCOC Counselor record.
 - g. **Enroll Date:** Enter date when consumer started working with Provider.
 - h. **Comments:** Enter notes, if applicable.
7. Select **Save and Close PCOC Counselor** from the **File** menu.

Plans & Assessments Tab

If PCOC is started in the call record, the Intake & Screening Tool and the PCOC Tool will carry over into the Consumer Record.

1. Click on **Plans & Assessments** tab.
2. The Documents, Intake & Screening Tool and the PCOC Tool, from the Call record are available in the list view grid.



Plan/Assessment	Review	Review Date	Worker	Division	Status
Intake & Screening Tool	N/A	07/13/2021	Guglielmo, Barbara		Open
PCOC Tool	N/A	07/13/2021	Guglielmo, Barbara		Open

Plans & Assessments list page

3. Click on the PCOC Tool.

If PCOC Referral Made Without Documentation

A consumer record can be created from a Call record without the PCOC Tool started.

1. Click on **Plans & Assessments** tab.
2. Select **Add Plan/Assessment** from the File menu.
3. From Please Select Type, Select **Person Centered Options Plan**.
4. Select **Open** for the Review field.

File

Please Select Type: **Person Centered Options Plan**

Consumer Assessments

Review * **Open** Worker * Guglielmo, Barbara **Clear** **Details**

Review Date * 07/18/2021 **DD** Status * **Draft**

Division * **PCOC**

Person Centered Options Plan

Person Centered Options Plan

5. Complete the form.
6. Change the Status to **Pending**.
7. Select **Save Plan/Assessment** from the File menu.
8. Select an Action Plan from the Word Merge menu.



Word Merge Menu

9. The Word Merge Editor window will open, displaying the Person Centered Action Plan.

File

Generate Merge Document
Click the "Open Document" button to open the Merge Document for editing.
Open Document

Save to Note
If no changes have been made to the Merge Document, click "Save to Note". The current word merge template will be uploaded to a note record with the merge fields populated.
Save to Note

Upload and Save to Note
If changes were made to the Merge Document, click "Upload and Save to Note" to select the saved file and upload that document to a note record. Don't forget to delete the saved document after you have attached it to the note record.
Upload and Save to Note

Preview (read-only)
This is a preview of your merge document and is not editable.

WordMergePDFPreview.ashx 1 / 3 67%

Your PCOC Action Plan:

Person-Centered Profile:

Goal:

Action Steps:

Service Options:

Goal Update:

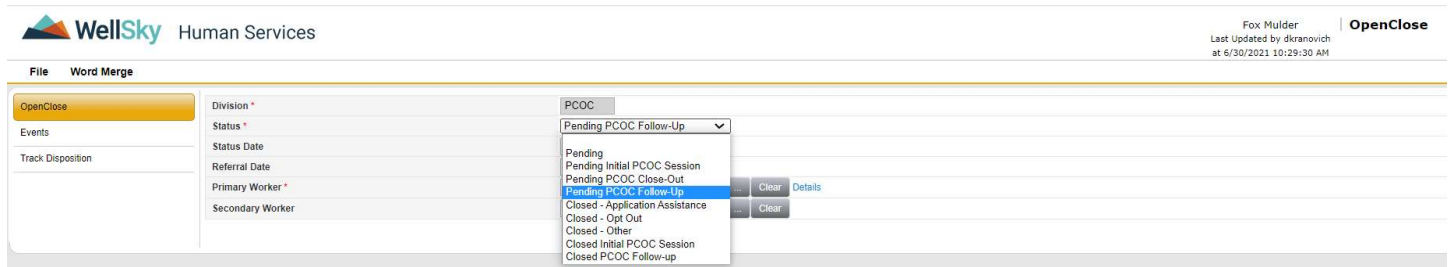
- Go to page 64 to complete next steps.

PCOC Status in the Consumer Record

This section is used to document where in the process a counselor and consumer are in the workflow.

Documenting the PCOC Status:

- Click on the OpenClose tab.
- Click on the OpenClose record in the list view grid.
- Select the value from the Status field.




[OpenClose Details Page](#)

- Select **Save and Close OpenClose** from File menu.

PCOC Closure (Opt Out, Application Assistance, Other, Initial PCOC Follow-Up or PCOC Follow-Up)

- Click on the PCOC Counselor tab.
- Click on the PCOC Counselor record in the list view grid.



Division	Provider	Disposition	Disposition Date	Enroll Date	Close Date	Worker	LOS
PCOC	Executive Office of Health & Human Services	Open	07/12/2021	07/12/2021		Kranovich, Dan	6

[PCOC Counselor List Page](#)

- The PCOC Counselor Details page displays.
- Change the Disposition to Closed.

File Tools

PCOC Counselor

Enrolled Workers

Track Disposition

Division * PCOC

Referred By Kranovich, Dan [Clear](#) [Details](#)

Referral Date

Provider * Executive Office of Health & Human Services [Details](#)

Disposition * Closed

Disposition Date * 07/18/2021

Enroll Date * 07/12/2021

Comments

Close Data

Close Date * 07/18/2021

Comments

[PCOC Counselor Details Page](#)

5. Enter Comments under the Close Data.
6. Select **Save and Close PCOC Counselor** from File menu.
7. Click on the **OpenClose** tab.

Demographics **OpenClose** PCOC Counselor Plans & Assessments Notes

[Consumer Chapters](#)

8. Click on the OpenClose record in the list view grid.

Demographics **OpenClose** PCOC Counselor Plans & Assessments Notes

Filters

Division

Search Reset

1 OpenClose record(s) returned - now viewing 1 through 1

Division	Status	Close Date	Primary Worker	Secondary Worker
PCOC	Pending PCOC Follow-Up		Kranovich, Dan	

First Previous Records per page 15 Next Last

[OpenClose List Page](#)

9. Select value from the Status dropdown list.
10. A message will display. Click OK.

WellSky Human Services

File Word Merge

OpenClose

Events

Track Disposition

Division * PCOC

Status * Closed Initial PCOC Session

Status Date 06/30/2021

Referral Date

Primary Worker *

Secondary Worker

Outcome

HCBS Referral - OSCIL

HCBS Referral - Other

HCBS Referral - RACE

Authorizations for the consumer will be terminated and all current Ticklers will be marked as Cancelled. New Ticklers can be added, if necessary. Click "OK" to continue or "Cancel" to return back to the detail page.

OK Cancel

[OpenClose Message with Status = Closed Value](#)

11. The page will refresh with Close Date and Outcome fields displaying on the page.
12. Select value(s) for the Outcome field.

File Word Merge

OpenClose
Events
Track Disposition

Division *

Status *

Status Date

Referral Date

Primary Worker *

Secondary Worker

Close Date *

Outcome

POOC

Closed - Application Assistance

07/19/2021

08/30/2021

Kranovich, Dan

07/19/2021

Client Withdraw Medical Application
HCBS Referral - DHS Community
HCBS Referral - NHTP
HCBS Referral - OHA Community
HCBS Referral - OSCIL
HCBS Referral - Other
HCBS Referral - RACE

Clear

Details

Clear

[OpenClose Details Page](#)

13. Select **Save and Close OpenClose** from File menu.

Training Notes